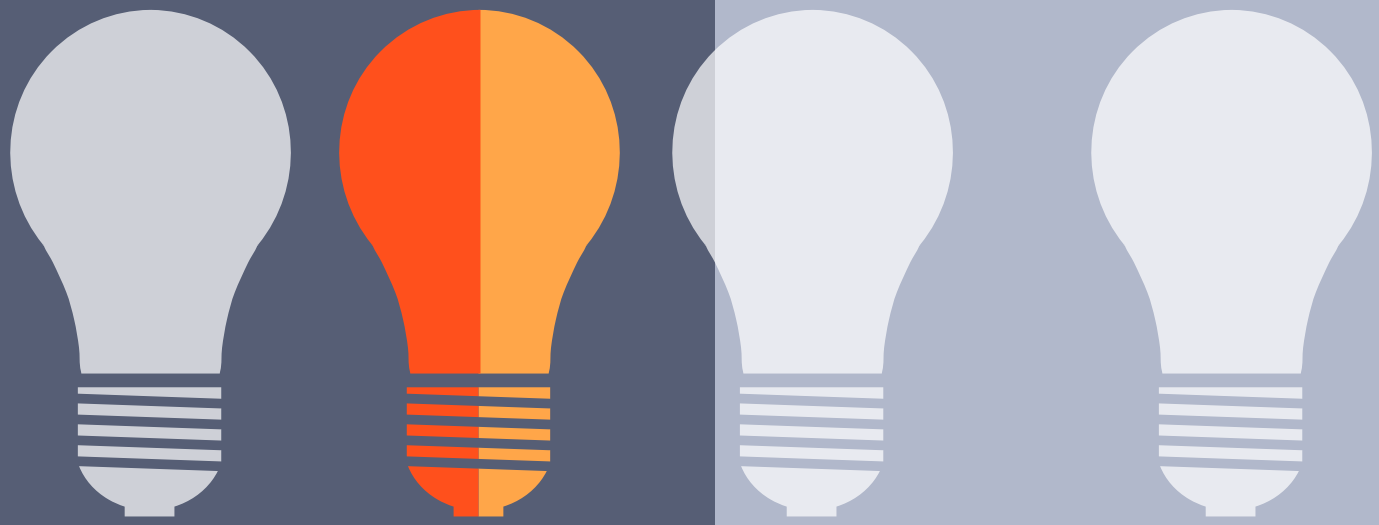
CONTENT STRATEGY ALLIANCE

TOOLS & TEMPLATES



A BEST PRACTICES HANDBOOK

Content Strategy Alliance Tools And Templates

A Best Practices Handbook

First Edition

What to do, when to do it and how to document it.

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Foreward

When Noreen Compton asked me to head up the best practices initiative for the Content Strategy Alliance last year, I had no idea what to expect from the venture. Initially, the goal was to pull together a set of best practices for content strategy. This guidance, however, required refinement.

We first set out to define the role of the Content Strategy Alliance with a positioning statement and charter, and from that decided the initial effort for best practices would be to focus on a set of standardized tools and templates. I was finishing up *Enterprise Content Strategy: A Project Guide* and I knew that there existed a definite need for more formal tools and guidance around use.

After hours and hours of work and effort, the Content Strategy Alliance team had finally completed a preliminary set of 36 templates and 37 examples from which any and every content strategy practitioner could benefit, whether a content matrix template or a project charter example. This tool-kit contains a comprehensive set of tools and best practices. And from my own years of experience, each example and template are top-notch.

Every professional discipline needs a tool-kit and standards. The Content Strategy Alliance seeks to provide guidance through a uniform set of standards. Content strategy has been around for a while, but as a practice, we see continual evolution. This effort demonstrates a commitment to standardizing a set of tools, templates and best practices for new and seasoned practitioners.

The effort represents countless hours of industry experts pulling together a set of templates and tools, reviewing these and creating what we feel is the most comprehensive set of tools to date. We even provide descriptions of each tool with some best-practices information for use.

I know this effort will provide value to the hundreds of practitioners out there,

as well as set a standard for best practices for use of the tools. Along with this team, I look forward to providing updates to this body of work, as well as evolving the practice of Content Strategy as whole. I hope you find this effort useful. Use these tools and templates, modify each as necessary, and feel free to use the contact form on the Content Strategy Alliance website to provide any feedback to improve upon what we have started.

Now go out there and continue to produce unique, amazing and wonderful content experiences!

Kevin P Nichols
July 2015

Introduction

The Content Strategy Alliance (www.contentstrategyalliance.com) Best Practices Committee was created to provide best practices resources for the content community. Rather than focusing just on a list of resources, we decided that a step-by-step guide to content strategy was needed. Building on the many books and articles already out there, we saw a need to define the basic tasks and deliverables that might be part of a typical content strategy project.

Content strategy has matured to the stage where tasks and best practices can be defined, leaving us with more time to struggle with the ever-changing content landscape (e.g., omnichannel, personalization, what tools will streamline the content strategy processes, etc.), and to work to advance content strategy to its rightful place in the C-suite (Chief Content Officers, anyone?).

While there is disagreement as to what is a "UX" task versus a "Content Strategy" task or a "Marketing/Content Marketing" task, we have included tasks based on answers from our 2014 Content Strategy Survey, online research of job descriptions, and our own diverse experiences and lessons learned. While these tasks and deliverables apply to web projects, they can also be applicable to other content projects: print, ads, video, technical communication, etc.

It's important to note that every content project is different. The tasks and deliverables created for every content project will also differ. It is unlikely that you will use every deliverable we present in this handbook on every project you do. You are encouraged to pick and choose those that are relevant and useful for your purposes and adapt them as necessary.

The examples, templates and steps we provide are representative, not definitive. Our intent is for this to be a resource that evolves over time as the content landscape and the ways we work change.

We welcome your input on what we may have missed and how we can improve what we have presented.

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What is Content Strategy?

Oh dear….
It depends on who's talking….

At the Content Strategy Alliance, we define it as "Getting the right content to the right user at the right time through strategic planning of content creation, delivery and governance." (This combines parts of the definitions put out there by Kevin P. Nichols and Kristina Halvorson.)

The Digital Content Strategy Best Practice Guide by Econsultancy (that looked into issues, themes and challenges within content strategy) from February of 2014 found:

"… there is a broad definition of content strategy. For some, the concept is more tightly focused on content marketing and fulfilling marketing-related objectives including driving awareness, customer acquisition or loyalty."

"For others, content strategy more broadly encompassed information architecture, content structure, origination, re-use and user experience. Most respondents, however, recognized that a fulsome definition of content strategy needed to incorporate an end-to-end process covering all these aspects."

The CSA acknowledges that content strategy is defined in more than one way: by practitioners, interested parties and companies large and small. And, in addition to content strategists, it is performed by people with various titles, including information architects, project managers, marketing managers, technical communicators, user and usability researchers, etc. (The 2014 Content Strategy Survey Report found that only 1/3 of respondents who reported doing content strategy held the title of content strategist.)

The debate over content strategy will continue, but we hope this handbook will provide help for those working and possibly struggling through the end-to-end process of content strategy, or those wondering how to begin or expand a content strategy for their business.

Why Do You Need a Content Strategy?

There are many books out there justifying why a content strategy is necessary and demonstrating the business value of a holistic and unified content strategy. This work does not intend to replace those resources.

We believe, in general, a unified content strategy:

- Helps an organization figure out the most effective and useful content and make informed decisions about new content areas, tying such decisions to a larger, strategic framework.
- Creates an approach to quantify and show the value of content within an organization.
- Positions the right content and informs its continual creation and evolution, to meet business needs and objectives, while fulfilling a brand or organizational promise to a consumer.
- Creates a process and maintains it for efficient and effective content publishing, from creation through to archiving.
- Facilitates intelligent content and performance-driven content solutions.
- Helps define processes, tools and resources to support content solutions.
- Drives multichannel content solutions.
- Reduces costs and creates a Return on Investment (ROI)-driven model for content (all content can be and should be a quantifiable business asset).

Today we need to account for content at not just a document level, but at an object level. Documents may provide a structure, websites may yield a page, devices such as smartphones may serve up content, but today's world demands an approach ridden with complexity and nuance. Many types of content live within documents or a larger experience, such as a website.

We need formats that allow us to publish to many channels. Ann Rockley describes this type of content as "intelligent content" and posits:

"Content that is structurally rich and semantically categorized, and is therefore automatically discoverable, reusable, reconfigurable, and adaptable."

In this sense, a structure is the hierarchical order in which content occurs in an information product. Every organization produces content and frequently for many different consumers and for many different platforms. Often, semantic solutions drive the solution because semantically rich content means that machines can "understand" what to do with content and when to do it.

Content strategy helps define and position all content for success, but especially intelligent content. The best practices, tools and deliverables outlined in this guide are intended to support the entire ecosystem that rich content experiences demand.

What is a Best Practice?

"A set of guidelines, ethics or ideas that represent the most efficient or prudent course of action. Best practices are often set forth by an authority, such as a governing body or management, depending on the circumstances."

— *Investopedia.com*

"A best practice is a method or technique that has consistently shown results superior to those achieved with other means, and that is used as a benchmark. In addition, a 'best' practice can evolve to become better as improvements are discovered. Best practice is considered by some as a business buzzword, used to describe the process of developing and following a standard way of doing things that multiple organizations can use."

—*Wikipedia*

So what are the best practices for content strategy? We have divided our choices into phases. (Depending on your project, you may do these tasks in a different order.) In each phase you might find:

- Common deliverables you may need to create in that phase.
- Steps to complete the deliverables.
- Templates you can use to format your deliverables.
- Some examples of finished deliverables.

How To Use This Handbook

In compiling and laying out this handbook, we have tried to keep it simple, informative and above all useful. To do that we've tried to be as uniform as possible and anticipate and accommodate differing user styles and needs. We've adopted several conventions to make it easier...we hope.

Page Types

The handbook employs three different page types:

1. Narrative pages that provide our thoughts on content strategy processes and more.
2. The best practice pages that make up roughly half the document.
3. The example pages that follow each best practice and make up the other half.

Note: The templates do not appear in the handbook but are downloadable in a number of ways either individually or collectively (see downloads below).

Format

Collectively the handbook has been published as an American letter size (8.5 x 11inch) PDF document and all pages are laid out in "portrait" format for ease of printing.

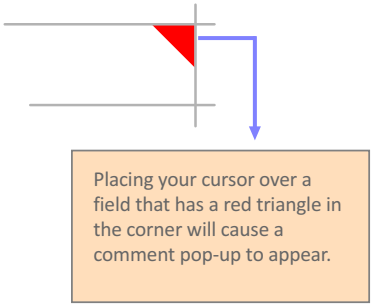
Many of the examples are created in MS Excel and in some cases 100% scale exceeds the page length dimension. To make them viewable you will need to:

1. Click on the "View" tab on the tool bar at the top of your PDF viewer.
2. Select "Rotate View" from the dropdown menu and click on "Clockwise" = Shift+Ctrl+Plus
3. Click on the "zoom + button" to enlarge to 300% or whatever size is comfortable.
4. Remember to rotate the view back ("counter clockwise" = Shift+Ctrl+Minus) to continue portrait page viewing.

Other examples that are of substantive length (more than 4-5 pages) have been included as separate stand-alone downloadable PDF documents for the sake of brevity.

MS Excel Comments

In some cases comments have been used in MS Excel templates and examples to provide richer explanations, instructions or definitions.

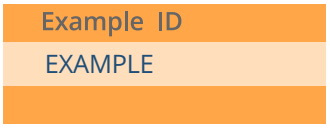


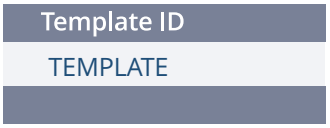
Comments are indicated by a red triangle in the right-top corner of the relevant field. Hovering over the field will cause the comment pop-up to appear. You can remove these comments by performing the following steps:

1. Click on the field containing the comment.
2. Open the “REVIEW” tab on the top tool bar.
3. Click on the “DELETE” comment icon.

Examples and Templates

To avoid confusion and for ease of reference: Template mastheads are blue. Example mastheads are orange.





Downloads

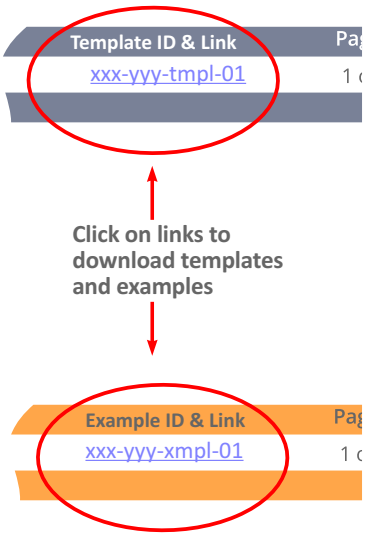
There are a number of ways in which templates and examples can be downloaded either from the website or links within the handbook itself.

Handbook

Template download links are located in the top information bar of the best practices masthead.

This allows you to download the individual template as you read the best practice.

The example that follows the best practice has an example download link positioned in the same location on the example page masthead.



At the end of the handbook Appendix 2 contains the indexed list of all of the best practice templates and examples. You can download each template or example individually as you may require or alternatively there is a download toolbox button that will allow you to download the complete set of tools.

Website

Copies of this handbook are available for download on the Content Strategy Alliance /Best Practices page. Additionally there is a toolbox button to download the complete set of templates and examples as well as an index of each template and example which can be downloaded separately as needed.

PLAN

Planning Phase

During this phase, the strategic intent, goals and objectives of the project will be identified.

Questions to answer are:

”How should success be measured?”
”Who are the decision makers?”
”What is the reason we are doing this?”

Content Project Brief

Here we define what the content project is (as opposed to the overall project as defined in the project brief created by the project manager), what it will take to complete it and the metrics used to define its success. These beginning metrics will be based on the objectives and goals of the project so we will know at the end of the project if it was successful. More detailed metrics might be defined later.

Create a Project Brief:

- Describe the project and list key deliverables and project requirements.
- List the goals of the content, e.g., drive better understanding of a company's products.
- Define the type of content experience that will achieve the goals, if known, e.g., clearer messaging, more interactive content. (In the analyzing phase, you will assess the user/customer experience that will help further define these.)
- Decide on the content analytics and metrics that will set the standards for measuring and evaluating whether a content project meets its stated goals. Will you use analytics, focus groups, user research, usability testing, multivariate testing, A/B testing or other methods?
- What should be measured: views (website pages, videos, etc.), emails opened, tweets re-tweeted, wall posts shared, products and services sold or other criteria. Does the stakeholder wish to define internal metrics? (A common internal metric is operational efficiency: the ratio between inputs such as money, time and effort and the outputs such as money, greater productivity and quality. The goal is for output to be greater than input.)
- How often will metrics be measured?
- How will the metrics be used (e.g., to change the content on the site, determine company strategic direction)?
- What will define success for the project?
- Define the business, consumer and creative objectives.
- Define the target audience.
- What legal mandatories must be included?
- What is the timing for the project and main milestones?
- What is the main messaging?
- Who are the competitors?
- Describe the aesthetics (look and feel).

Best Practice ID	Version	Created	Author	Example ID & Link	Pages
cpb-pln-bp	01.	MAR-2015	CSA-BPC	cpb-pln-xmpl-01	1 of 1

Content Project Brief Example

Example ID	Example ID & Version	Phase	Creation Date
CONTENT PROJECT BRIEF EXAMPLE	cpb-pln-xmpl-01	PLANNING	MARCH, 2015

PROJECT:	Cruise Line Video	JOB # 8000-14
ROLE	**PERSON(S)**	
Content Strategy Lead	Rhoda Carr	
Project Manager	Sandy Beach	
Business Owner	Chanda Lear	
Stakeholders	Billy Kidd, Jesse James	
Account Manager	Lou Alcindor	
Creative Director	Crispin Porter	
Subject Matter Experts	Jill Knowitall	

PROJECT ELEMENTS	DESCRIPTION	ADDITIONAL NOTES & COMMENTS
Project Details	Provide creative direction for a two-minute video that will feature the Cruise experience. This video will be featured in the next launch of the website on the home page.	
Deliverables	Storyboards, final two-minute video in HD	
Requirements	Create a two-minute video that speaks in an inviting voice and delivers inspiring music and visual design	
Goals of the content	Increase cruise signups	
Content Experience Requirements	Clearer messaging, more interactive content	
Analytics & Metrics	Increased page views and time on page	
Key Success Factors/Measurement Strategy	Increased cruise signups	
Business Objectives	The web presence will continue to position the client with a differentiated identity, educating and leading the cruise-travel market in the deluxe category for experienced and quality-focused travelers.	
Consumer Objectives	Reach more of the HH1 150K+ market	
Creative Objectives	Produce a best-in-class web experience that is significantly better than the client's competitors.	
Target Audience	Boomers and matures (age 50+) who have the time, net worth and interest; HHI 150K+; experienced travelers; and cruisers looking for a unique cruise experience.	
Legal Mandatories	All appropriate disclaimers	
Project Timelines/Milestones	**Friday 8/03:** Video project kickoff **Wed 8/08:** Review draft **Wed 8/08:** Deliver brief and storyboard to client for approval	
Messaging	Experience the impeccable ship detail and personalized on-board service unique to our client.	
Competitive Landscape	While there are a number of cruise lines catering to HH1 150+, there is a lack of perceived value, which we hope to address.	
Aesthetics (look and feel)	Key frames of the video sequence will show specific parts of the ship that the viewer ("our guest") will experience as the video plays, while also leveraging photographic elements taken during a recent cruise. Key images are supported with descriptive text and related transition scenes.	

Governance Model

The governance model is the structure and plan that specifies the responsibilities, rules and processes by which content will be created, monitored and updated. A governance model for content should:

- Ensure the quality of content throughout the organization.
- Review, approve and oversee content changes.
- Recommend changes.
- Oversee and approve all tools.
- Communicate policy changes.

To Review an Existing Governance Model:

- Analyze what is successful about any existing governance model and process.
- Identify gaps and challenges with the existing structure.
- Decide if you are keeping that structure.

Create a Governance Model:

- Decide on a governance model type:
  - Centralized Model—All content, strategies and processes are controlled by a single organizational structure.
  - Federated Model—Different organizational business units control or govern their own content, strategies and processes.
  - Hybrid Model— All content, strategies and processes are controlled by a single source, but distinct lines of business write and recommend standards for their own content and then roll up to the centralized authority.
- Set up the governance committee that will oversee all aspects of content governance.
- Appoint an executive sponsor, preferably someone who directly represents executive management interests or someone who has direct access to and proven credibility with senior management. This person is the ultimate escalation point for arbitration on unresolved issues.
- Set up working groups to handle processes that have shorter cycle times if needed, e.g., taxonomy, content calendar, omnichannel, SEO and technology.
- Set up the core team: the executive sponsor invites, appoints or takes recommendations for representatives from existing content stakeholder functions and departments, business units, working groups, customer representation groups, etc.
- Define and document responsibilities.
- Decide how often the governance committee will meet.

Governance Model Example

Example Name	Example ID & Version	Phase	Creation Date
GOVERNANCE MODEL EXAMPLE	gmp-pln-xmpl-01	PLANNING	MARCH, 2015

INSTRUCTIONS

CREATING THE GOVERNANCE MODEL When creating a governance structure, you must first determine which type of structure will best support the organization's needs. Typically, two approaches are used in content governance: a centralized and a federated model. Sometimes a hybrid of the two is effective as well.

Centralized Model —All content, strategies, and processes are controlled by a single organizational structure.

Federated —Different organizational business units control or govern their own content, strategies, and processes.

Hybrid —All content, strategies, and processes are controlled by a single source, but distinct lines of business write and recommend standards for their own content. These roll up to the centralized authority. Regardless of the type of model your organization chooses, a content governance model should contain the following roles:

Executive Sponsor —The evangelist for content governance throughout the enterprise. The executive sponsor is the ultimate escalation point for arbitration on unresolved issues by the governance committee.

A Governance Committee —Comprised of several key stakeholders and owners of content. The governance committee defines, sets, oversees and enforces all content policies, standards and aspects of the content governance ecosystem.

Working Groups to Support the Committee —Creates and oversees the standards, documentation and processes for specific functions assigned by and on behalf of the governance committee.

Governance Role	Code	Governance Body	Individual Members	Organizational Role	Accountabilities	Meeting Frequency	Authorities	Reports to
Head of Committee	0.0	Executive Sponsor	John Smith	Chief Marketing Officer	Leads the Governance Committee. Acts as the primary liaison between the organization & the GC	1 per quarter	Holds executive authority over all content governance decisions and solutions	Executive Management
Gov Committee Management Team Member	0.1	Governance Committee	Jane Sweet	Head of Content	Has oversight of the end to end content lifecycle	1 per quarter	Has the veto vote on content, oversight of the content calendar working group	Content Governance Committee
Gov Committee Management Team Member	0.1	Governance Committee	Bill Davis	Compliance officer	Ensures that content meets regulatory, statutory and organizational standards and procedures	1 per quarter	Veto Vote on Content Compliance and risk	Content Governance Committee
Gov Committee Management Team Member	0.1	Governance Committee	Georgina Gupta	Senior Marketing Manager	Ensures that content aligns with the brand(s) message	1 per quarter	Veto Vote on Brand alignment and oversight of the channel strategy working group	Content Governance Committee
Gov Committee Management Team Member	0.1	Governance Committee	Jacques Larouge	Customer Service officer	Oversight of customer service and engagement activities	1 per quarter	Veto vote of user experience. Oversight of the UX & usability working group	Content Governance Committee
Gov Committee Management Team Member	0.1	Governance Committee	Indra Sanjay	Senior Technical Officer	Acts as liaison between IT and all content format, channel and delivery management systems & software	1 per quarter	Oversight of the SEO, Analytics and optimization working groups	Content Governance Committee
Head of Working Group	1.0	Content Calendar Working Group	Jessica Mapplethorpe	Web Content Editor	Leads the Content Calendar working group. Holds veto vote on content published	1 per month	Approves changes to Content Calendar	Jane Sweet: Head of content
Working Group Member	1.1	Content Calendar Working Group	Gill Marcus	Content Engineer	Has oversight on all personalization and localization strategies	1 per month	Recommends on personalization and localization solutions	Jane Sweet: Head of content
Working Group Member	1.1	Content Calendar Working Group	Gina DeSousa	Senior Copywriter	Oversight all content creation scheduling and updates	1 per month	assigns content creation work and recommends on style guidelines	Jane Sweet: Head of content

Stakeholder Interview/Organizational Needs Survey

Stakeholder interviews/organizational needs surveys are interviews with the people responsible for the content or the overall project (stakeholders). The goal is to find out what and how much content currently exists, the content requirements (word count; image, video and downloadable file sizes, etc.), business requirements and possibly the technical requirements.

Create a Stakeholder Interview/Survey:

- Identify key stakeholders who are empowered to make decisions.
- Create a list of content, business and technical questions to ask.

Be sure to find out what background material is available, decisions have been made, issues that need to be addressed, pain points and what stakeholders want to change or add.

Reference:

Nichols, Kevin P. Content Strategy — *Current State Analysis and Stakeholder Interview Protocol*

Stakeholder Interview/Organizational Needs Survey Example

	Example Name	Example ID & Version	Phase	Creation Date
CONTENT STRATEGY ALLIANCE	STAKEHOLDER INTERVIEW TEMPLATE (Reprinted from: http://kevinpnichols.com/downloads/kpn_current_state_stakeholder_protocol.pdf)	sons-pln-tmpl-01	ASSESSING	MARCH, 2015

CONTENT INVENTORY & SCOPE

	QUESTIONS	RESPONSES	COMMENTS
1	Do you have a list of all the different types of content that you work with? Is there a sitemap (for websites) or any information architecture work that we can leverage to determine the content types and scope?	Yes	
2	Have you performed any inventories or audits that we could leverage to determine the scope of the content we must consider?	Yes	
3	Do you use content inventories and auditing as an ongoing process (e.g., annual audits) to evaluate the ongoing efficacy of your content and its performance?	We do not do them on an ongoing basis. Should we?	
4	Can you help us create a comprehensive list of content types that your organization works with (if the list is not pre-existing)?	We will send you the list	
5	In terms of quantity and volume, how much content is there?	Approximately 100000 pages have been indexed. We are not sure how much is different templates. It's sort of all over the place.	
6	What is the frequency and amount of content published (this can be to any and all properties being considered)?	Content is published every day. We have an editorial calendar we can supply to you.	

Note: This is a multi-page document. To view the entire example, you will need to click on the Example ID & Link above or refer to the “How to use this book” page for further downloading and viewing options.

Content Strategy Roadmap

A content strategy roadmap plots the short-, mid- and long-term goals for a content strategy initiative. This tool can help prioritize content initiatives and present an overarching vision with achievable, incremental projects.

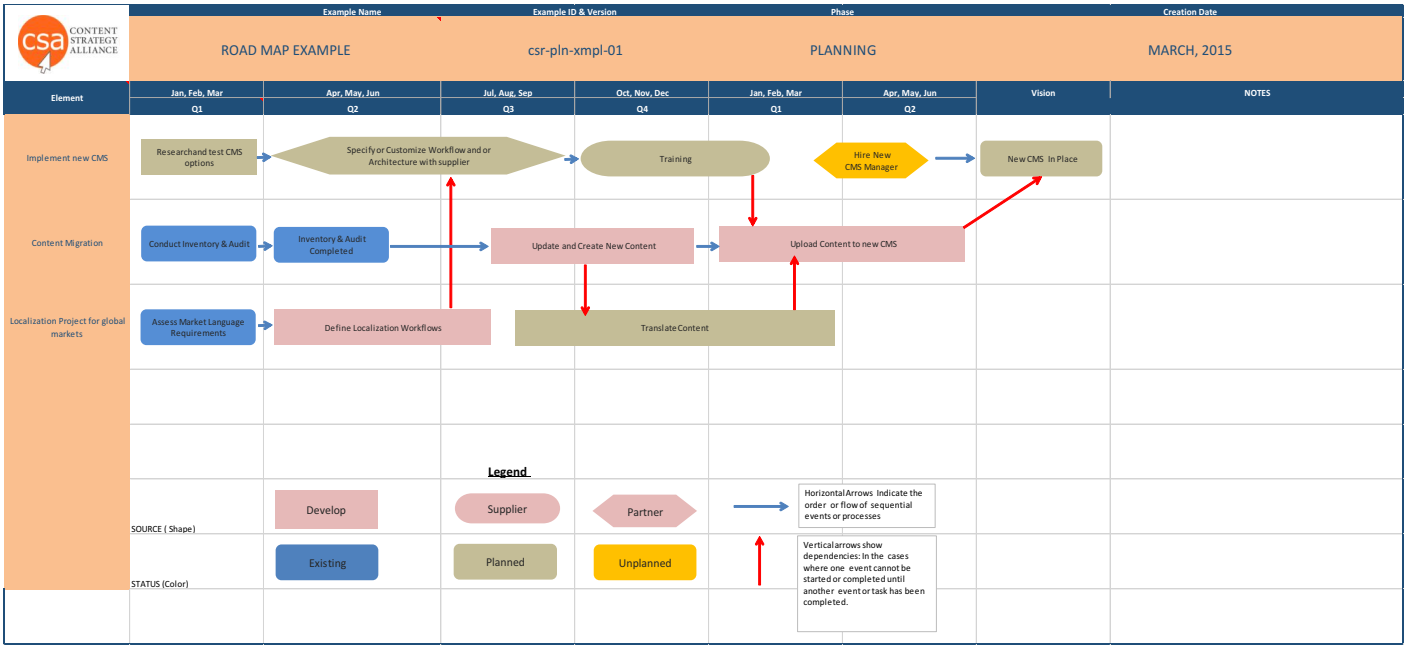
A roadmap should also include a long-term vision and show the projects along a timeline that will help you arrive at the desired goals.

Create a Content Strategy Roadmap:

- Refer back to the projects, goals and objectives defined in the content brief or other documents (e.g., the contract or statement of work).
- Be sure to include necessary elements from your business strategy, editorial calendar and upcoming business initiatives such as campaigns, rollout of new site features, etc.
- List any related specific projects such as the rollout of a content management system (CMS) and the short- and long-term vision of these initiatives.

Best Practice ID	Version	Created	Author	Example ID & Link	Pages
csr-pln-bp	01.	MAR-2015	CSA-BPC	csr-pln-xmpl-01	1 of 1

Content Strategy Roadmap Example



ASSESS

Assessing Phase

This phase will determine the “where, what, who and when” of your content: where it lives; what content you have, if it is original or syndicated and if there are any restrictions on its use; who in your organization “owns” the content and when it is reviewed and updated. You should evaluate the content of your competitors to determine which content you may be missing.

User/Customer Experience Assessment

The user/customer experience assessment evaluates the current overall experience of the user. A UX person or a content strategist often conducts this and gives their opinions on the current customer experience. This can be useful information to include in the content audit/assessment.

Create a User/Customer Experience Assessment:

Usability: Can the user/customer use the content easily?

- Consistency: Through testing, determine if inconsistencies exist and to what extent these are impeding the user experience.
- Accessibility: Check with the Functional Accessibility Evaluator
- Recognition (Intuitiveness): Determine how easily an average user can immediately grasp how to use a particular product.
- Navigation: Evaluate the ease-of-navigation as well as the site's flow, transitions, interactivity and clear communication of progress.
- Page Load Time: Determine page load time through user testing and via a tool such as Pingdom Website Speed Test.

Usefulness: Is it worth it to use it?

- Functional Expectation: Is the content of the website (or microsite or app, etc.) what the target user is going to expect based on expectations set by the product (e.g., a site promises users will be able to generate reports, but in practice users cannot).
- Errors: Do steps in the user's navigation help prevent errors? Does the product provide clear and simple messaging that allows the user to return to the correct path, quickly and easily?
- Product Differentiation (Memorability): When compared to other similar products, does your product offer users a unique, memorable solution?
- Findability: How easy is it for search engines to find the content? How easy is it for users to bookmark it?
- Credibility: Can the user easily verify that the information being provided by the online product is accurate and coming from a reputable source?

User/Customer Experience Assessment

Desirability: Does the user/customer want to use it?

- Aesthetics: Is the look and feel clean, sharp, pleasing and enjoyable, as well as non-intrusive to the user experience?
- Page Layout: Does the site have a clear visual hierarchy and flow, as well as an intuitive grouping and alignment of elements? For example, is the user easily drawn to the most important content?
- Color Scheme/Contrast: Does the site or page's color scheme accurately convey the message or theme you want to associate with the product? Are there any colors that distract from the message/theme?
- Typography: Is the typography from page to page and section to section clean, readable, and consistent?

Reference:

The Product Guy *"Quick UX: Heuristics for User eXperience"*

Nichols, Kevin P. *Current State Analysis and Stakeholder Interview Protocol* has a content experience section.

User/Customer Experience Assessment Example

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Example ID	Example ID & Version	Phase	Creation Date
USER CUSTOMER EXPERIENCE ASSESSMENT EXAMPLE	cuxa-ase-xmpl-01	ASSESS	MARCH, 2015

ASSESSMENT QUESTIONS	FINDINGS	COMMENTS
Usability: Can the user use the content easily?		
Consistency – through testing, determine if inconsistencies exist and to what extent theyfe impeding the user experience	Navigational headings don't match the page headings in the Jewelry section	
Accessibility – measure using Functional Accessibility Evaluator http://fae.cita.uiuc.edu	Low	
Recognition (Intuitiveness) – Determine how easily an average user can immediately grasp how to use a particular product	Instructions for the Hair Genie are not clear	
Navigation – Evaluate the ease-of-navigation as well as the site's flow, transitions, interactivity, and clear communication of progress.	Navigation could be clearer	
Page Load Time – determine through user testing and via a tool such as Pingdom Website Speed Test http://tools.pingdom.com/	Load time is too long on many pages	
Usefulness: Is it worth it to use it?		
Functional Expectations – Is the content of the website (or microsite or app, etc.) what the target user is going to expect based on expectations set by the product (e.g., a site promises users will be able to generate reports, but in practice users cannot)	Demos will need to be referenced frequently, so they should be PDFs or printable pages	
Errors – Are there steps in the user's navigation that prevent errors? Does the product provide clear and simple messaging that allows the user to return to the correct path, quickly and easily?	Navigation is good.	
Product Differentiation (Memorability) – When compared to other similar products, does your product offer users a unique, memorable solution?	No, functionality needs to be more advanced.	
Findability – How easy is it a) for search engines to find the content, and b) for users to bookmark it?	More and longer content could help search engine rankings.	
Credibility – Can the user easily verify that the information being provided by the online product is accurate and coming from a reputable source?	Better attributions are needed.	
Desirability: Does the user want to use it?		
Aesthetics – Is the look and feel clean, sharp, pleasing and enjoyable, as well as non-intrusive to the user experience?	The site colors are jarring. Do not fit with a fashion-conscious audience.	
Page Layout – Does the site have a clear visual hierarchy and flow, as well as an intuitive grouping and alignment of elements? For example, is the user easily drawn to the most important content?	Pages are too cluttered.	
Color Scheme/Contrast – Does the site or page's color scheme accurately convey the message or theme you want to associate with the product? Are there any colors that distract from the message/theme?	Colors do not fit a fashion site, confusing users and not drawing them in.	
Typography – Is the typography from page to page and section to section clean, readable, and consistent?	Typography is bland.	

Content Inventory

A content inventory is a quantitative analysis of a channel, such as a website. It documents what content lives within a platform or experience, such as product content in a product management tool, or content within a website or app. A content inventory will answer the question: "What is there?"

Typically a content inventory gives information on page titles, a page description, content format, metadata and where the content lives. Inventories are also often customized to the particular project by the addition of information such as the content owner, the status of the content, indications as to its ultimate disposition (keep, edit, delete), and so on.

Create a Content Inventory:

- For a website inventory begin with an automated web crawl (a software application that runs over the internet and provides you a list of all URLs on the site) along with other information such as page titles. Your web developer or webmaster can usually get this for you, or you can use automated tools such as: Content Insight's Content Analysis Tool or Screaming Frog.
- To inventory non-website projects, list all the documents or other content assets relevant to the project.
- Determine what information you need that is not provided by the web crawl or is not on the original list of documents. Make sure the template you are using captures all the information you will need. Common elements include: URL, content type (HTML page, image, document, PDF, audio, video, etc.), content type (blog post, article, support, etc.), page title, page description, file size, links in and out, word count, keywords, meta description, date published, analytics. (Note: MS Excel is a common tool for capturing all the data in an inventory.)
- Categorize content using the following classification levels:
    - Structured: Content or information broken down and classified by metadata. An example of structured content is XML authoring used for multichannel publishing.
    - Semi-structured: Content or information with no separation between the data and the schema (the cognitive framework or concept that helps organize and interpret information). An example of semi-structured content is an MS Word document with tagged metadata.
    - Unstructured: Content or information that does not have a pre-defined data model and is not organized in a pre-defined manner. An example of unstructured content is free-form text in the body of a web page.

Content Inventory

- Identify duplicate URLs by sorting. This can be done easily in an MS Excel spreadsheet.
- Find pages with missing or duplicated meta titles and descriptions by sorting on those columns.
- Use word count to find pages that are below the recommended threshold for search optimization or pages that are disproportionately large.
- Use analytics data to find pages that are performing poorly for later analysis.

Reference:

Land, Paula Ladenburg. *Content Audits and Inventories: A Handbook*

Content Inventory Example

Example Name	Example ID & Version	Phase	Creation Date
CONTENT INVENTORY AUDIT EXAMPLE	cinv-ase-xmpl-01	ASSESS	MARCH, 2015

URL	Type	Title	Description	Notes on content	More notes	Content Suggestions	Analytics
					Company X has these sub-sections: Risks Monetary Management Company X Operations Deliveries Regulatory BusinessManagement Practices Company Company X Europe		
					Management Programs http://www.//Company X/Monetary/		
http://www.//		Monetary and Asset Management		Copy at the top of this page is the user-centric type of copy that should be on the "About Company Company X" page. Should the "Learn more about" box link directly to the pages that have the information in the bullet points? One of the only places in the site with a banner in the middle, it looks good but is it in line with 5.0?	http://www.//Company X/Company X-trans.html		2,860,000 uniques last month Over 20% bounce and 30% exit rate from the Monetary and Asset Management landing page - by far the highest in the entire Company X section. Under 200 uniques for each link out from the Monetary and Asset Management page
http://www.//	unknown	Risk Overview	Risk Landing Page -	"About xx" section is far too long and difficult to read along the right rail. Recommend shorter summary to appear as copy under banner. What does that xx banner accomplish? Shouldn't this be replaced with a four-panel banner that could guide users to further relevant information. Copy on the three boxes in the middle of the page is good but it's an overwhelming amount of information. Should this page be re-designed ala Company xx?	This page is linked to from the Landing Page It has 3 boxes with these headers: Performance Funds/Subject Y, Company Market Protections, Risk Tools Performance Funds/Subject Y Short intro 2 links: - View Current Margin Requirements http://www.//Company X/Subject Y (not showing up in audit??) Chart with pulldowns - box in lower Right Rail has info "About Performance Funds/Subject Y - should be in main body copy - Right Rail has lots of links - should consolidate - Performance Funds/Margin FAQ http://www.//Company X/Company-Company X-overview/ (not showing up in the audit???) List of jump link FAQ Right Rail has "Featured Links" - too many - Link to "Subscribe to Company Advisories" list of "Company X Advisory Contacts (list # for Customer Service Line	Does all the info in the Right Rail belong there?	4,588,000 uniques to this section last month. Only 1:59 spent per user on this page, relatively low given the amount of content. About half of users click through past the landing page, with the majority looking at the SPAN
http://www.//	unknown	(Redirect to http://www.//systems-operations/)		Copy descriptions are clear and concise. Are all related links relevant? Should some (holiday calendar) be replaced?	This page is the "Company X Operations Tab" under the Company X section. Provides a one sentence summary of Company X operations and then brIEEE summaries and paths to the following sub-pages: • Front-End Company X Systems • Average Pricing Calculations • Give-up Payment Systems • Broker Payment Systems • Money Calculations • User Guides Directory • Forwards Processing		829 uniques. About 75% of visitors stop here and do not click through to see further content. For those that do, front end Company X and technical standards are most popular. Some links (Money Calculations, Broker Options, Forwards Processing) have barely any clicks. Could we be serving up more relevant content here?
http://www.//	unknown	(Redirect to http://www.//Subject Y/Outrights/Vol Scans for Performance Funds/Subject Y - Company Group		Would suggest pluralizing copy in "About Performance Funds/Subject Y" to avoid using him/her - have included edit. "About Performance Funds/Subject Y" looks awkward in the middle of the right rail. I would suggest tightening copy to move it above the table or swap its position with related links.	Page is accessed through clicking on the "Performance Funds/Subject Y dropdown table on the Company X tab Table provides margin info for: • Short sells • Long sells • Futures • International Stocks		This is an important section with 23,000 uniques in the last month Users spent an average of 3:00 on this page, probably longer than they'd like to be searching for the information they're looking for
http://www.//	unknown	Outrights/Vol Scans for Performance Funds/Subject Y - Company Group	3 pulldowns: Exchange, Asset Class, Product - can filter	See Line 2	See Line 2		See Line 2
http://www.//	unknown	(Redirect to http://www.//confluence/display/EPICS ANDBOX/Company+Company X+Disaster+Recovery)		Is this still live on site? If so, how does user get here?	N/A		N/A
http://www.//	unknown	(Redirect to http://www.//Company X/-practices/Company-block-trade.html)		User path is: Company X -> practices-> block trades. Then scroll through on table at bottom Copy is good, page is easy to find and links are relevant.	Found by clicking "block fund overview" hyperlink on the practices page. This page is the "Company Products tab" on the table Gives table of criteria of block trades minimum thresholds for various Company products		1,420 uniques last month to the "General Info tab", about 3% of all user visiting the " practices" section 601 uniques to the "Company Products" tab Block data is far more popular with 26,000 uniques. Nearly all visitors to this page click through to block data
http://www.//	unknown	(Redirect to http://www.//Company X/-practices/Company2-block-trade.html)		See Line 26	Found by clicking "block fund overview" hyperlink on the practices page. This page is the "Company2 Products tab" on the table Provides table of criteria of block trade minimum thresholds for various Company2 products		See Line 26 3910 uniques to the "Company2 products" tab. Almost 90% of visitors arrive from either the "General Info" or "Company Products" tab
http://www.//	unknown	(Redirect to http://www.//Company X/-practices/Company3-Company4-block-trade.html)		See Line 26	Found by clicking "block fund overview" hyperlink on the practices page. This page is the "Company3 & Company4 Products tab" on the table Provides table of criteria of block trade minimum thresholds for various Company3/Company4 products		See Line 26 5434 uniques to the Company3/Company4 tab. More than 2:00 spent on average per visitor. Action search shows over half of visitors choosing to view the table in the provided Excel file
http://www.//	unknown	(Redirect to http://www.//Company X/Monetary-and-Subject B/description-of-IEEE-programs.html)		Link takes you to the IEEE Programs tab on the Monetary and Asset Management Page. "View the Guide" link is broken and simply keeps user on the same page. Maybe the link should be used to hide the text underneath and make it appear only when a user clicks on it. This tab gets buried in the table, is IEEE important enough to warrant its own page?	Monetary and Asset Management tab in the Company X section Provides two paragraph summary of Subject Z and then a table on the bottom that provides a wealth of information and pdfs. The tabs are : • Funds • Bonds • Tax Law • Regulatory • Online Trading		See Line 6 "IEEE programs" tab had 2721 visitors but only 1272 uniques. Seems like users might be ending up back on this page when looking for something else. Could also be due to the broken link on the page.
http://www.//	unknown	(Redirect to http://www.//Company X/Monetary-and-Subject B/)		See Line 6 This is the link for the Base and Guaranty Fund Products tab on the "Monetary and Asset Management" page. It's a pretty confusing meta title that should be re-written.	See Column F		See Line 6 CDs tab had 13600 uniques last month, IRS tab had 12. Average time spent on each was just under 2:00, which is appropriate given the amount of content
http://www.//	text/html	Outrights/Funds for Performance Funds | Subject Y - Company Group	Subject Y performance Funds requirements for futures and options contracts traded at Company Group including Company3 Company2 and Company4 Products.	See Line 23	See Line 23		See Line 23

Content Audit/Assessment

A content audit/assessment is a qualitative analysis of content in a particular channel or format, such as a website, or even an entire enterprise. It addresses the appropriateness of the content and its functionality. The content audit will build on the inventory and the user/customer experience assessment by evaluating the state of existing content, identifying the future-state content (new content and any content kept from the original source), and mapping the gap between the two so that a plan can be made.

Create a Content Audit/Assessment:

- Complete a heuristic (evaluating possible solutions through discovery, evaluation and experimenting: "trial and error") assessment using these best practices.
  - Does the content clearly explain how to do key tasks?
  - Are the voice and tone appropriate for the user?
  - Is the content up-to-date?
  - Is the content accurate?
  - Does the content engage the user?
  - Is the content free of grammar and spelling mistakes?
  - Does the content support the brand?
  - Are the calls to action (CTAs) clear?
  - Is the amount of content appropriate?
  - What is the purpose of the content and does it fulfill it?
  - Is it in the right format?
  - What is the value to the business of the content?
  - Is the content important to satisfying certain legal/governmental/business compliance criteria, e.g., accessibility issues, privacy notices, etc.?
  - Is the content written in a style and at an education level appropriate for the user?
  - Do headings and introductory text use keywords that are meaningful to the user?
  - Is the content easy to find in the navigation?
- Review any analytics and note any useful information: page views, bounce rates and shares. Identify which pages are receiving the most traffic, pages viewed the longest, etc.

Content Audit/Assessment

- Analyze the content on all URLs and decide if it will be kept, edited or deleted.
- Begin thinking about what content is missing for the content gap analysis, which maps the difference between the current state and the recommended future state. List suggestions for future content. Consult the competitive analysis for ideas. The gap analysis can be captured in the same template as the audit, or you can create a second document if needed.

Reference: Land, Paula Ladenburg. *Content Audits and Inventories: A Handbook*

Content Audit/Assessment Example

Example ID	Example ID & Version	Phase	Creation Date
CONTENT AUDIT-EXAMPLE	cinv-ase-xmpl-01	ASSESS	MARCH, 2015

URL	Type	Title	Description	Notes on content	More notes	Content Suggestions	ANALYTICS
					Company X has these sub-sections: Risk Management Financial and Collateral Management Company X Operations Company X Financial and Regulatory Surveillance Business Continuity Management/DR Practices Company Company X Europe		
					- Collateral Management Programs http://www.//Company X/financial-and-Subject X/description-of-inf-programs.html (Page header is "Subject Z) (same URL as above)		
http://www.//		Financial and Collateral Management		Copy at the top of this page is the user-centric type of copy that should be on the "About Company Company X" page. Should the "Learn more about" box link directly to the pages that have the information in the bullet points? One of the only places in the site with a banner in the middle, it looks good but is it in line with S.O?	http://www.//Company X/Company X-transactions-timeline.html		2,660 uniques last month Over 20% bounce and 10% exit rate from the financial and collateral management landing page - by far the highest in the entire Company X section. Under 200 uniques for each link out from the financial and collateral management page
http://www.//	unknown	Risk Management Overview	Risk Management Landing Page -	"About Risk Management" section is for low lang and difficult to read along the right rail. Recommend shorter summary to appear as copy under banner. What does that Risk Management banner accomplish? Shouldn't this be replaced with a four panel banner that could guide users to further relevant information. Copy on the three boxes in the middle of the page is good but it's an overwhelming amount of information. Should this page be re-designed als Company Globes?	This page is linked to from the Landing Page It has 3 boxes with these headers: Performance Bonds/Subject Y, Company Market Protections, Risk Management Tools Performance Bonds/Subject Y Short Intra Z links - View Current Margin Requirements http://www.//Company X/Subject Y/Revalidus-allPayoff (not showing up in audit??) Chart with pulldowns - box in lower Right Rail has info "About Performance Bonds/Subject Y - should be in main body copy - Right Rail has lots of links - should consolidate - Performance Bonds/Margin FAQ http://www.//Company X/Company-Company X-overview/performance-bonds.html#20 Chart with pulldowns - Z links (???) List of Jump link FAQ Right Rail has "Featured Links" - too many - Link to "Subscribe to Company Group Advisories" list of "Company X Advisory Notices Contacts list if for Risk Management Help Line	Does all the info in the Right Rail belong there?	4,586 uniques to this section last month. Only 1:50 spent per user on this page, relatively low given the amount of content. About half of users click through past the landing page, with the majority looking at the SPAN
http://www.//	unknown	(Redirect to http://www.//systems-operations/)		Copy descriptions are clear and concise. Are all related links relevant? Should some (holiday calendar) be replaced?	This page is the "Company X Operations Tab" under the Company X section. Provides a one sentence summary of Company X operations and then brief summaries and paths to the following sub-pages: • Front End Company X Systems • Average Pricing Calculations • Give-up Payment Systems • Back Office Systems • Money Calculations • User Guides Directory • Forwards Processing		2,929 uniques. About 75% of visitors stop here and do not click through to see further content. For these that do, front end Company X and technical standards are most popular. Some links (Money Calculations, Broker Options, Forwards Processing) have barely any clicks. Could we be serving up more relevant content here?
http://www.//	unknown	(Redirect to http://www.//Subject Y/Overnights/Vol Scans for Performance Bonds/Subject Y - Company Group		Would suggest pluralizing copy in "About Performance Bonds/Subject Y" to avoid using him/her - have included edit. "About Performance Bonds/Subject Y" looks awkward in the middle of the right rail. I would suggest lightening copy to move it above the table or swap its position with related links. See Line 2	Page is accessed through clicking on the "Performance Bonds/Subject Y dropdown table on the Company X tab Table provides margin info for: • Overnights/Vol Scans • Intras • Intras/Spans • Short Option • Asymmetric Scans		This is an important section with 23,000 uniques in the last month Users spent an average of 5:00 on this page, probably longer than they'd like to be searching for the information they're looking for
http://www.//	unknown	Overnights/Vol Scans for Performance Bonds/Subject Y - Company Group	3 pulldowns: Exchange, Asset Class, Product - can filter		See Line 2		See Line 2
http://www.//	unknown	(Redirect to http://www.//confluence/display/EPICS AND/BCK/Company+Company X+Disaster+Recovery)		Is this still live on site? If so, how does user get here?	N/A		N/A
http://www.//	unknown	(Redirect to http://www.//Company X/-practices/Company-Block-trade.html)		User path to Company X-> practices-> Block trades. Then scroll through on table at bottom Copy is good, page is easy to find and links are relevant.	Found by clicking "Block trade overview" hyperlink on the practices page. This page is the "Company Products tab" on the table Gives table of criteria of block trades minimum thresholds for various Company products		1,420 uniques last month to the "General Info tab", about 1% of all user visiting the " practices" section 681 uniques to the "Company Products" tab Block data is far more popular with 20,000 uniques. Nearly all visitors to this page click through to block data See Line 26
http://www.//	unknown	(Redirect to http://www.//Company X/-practices/Company2-block-trade.html)		See Line 26	Found by clicking "Block trade overview" hyperlink on the practices page. This page is the "Company2 Products tab" on the table Provides table of criteria of block trades minimum thresholds for various Company2 products		991 uniques to the "Company2 products" tab. Almost 50% of visitors arrive from either the "General Info" or "Company Products" tab See Line 25
http://www.//	unknown	(Redirect to http://www.//Company X/-practices/Company3-Company4-Block-trade.html)		See Line 25	Found by clicking "Block trade overview" hyperlink on the practices page. This page is the "Company3 & Company4 Products tab" on the table Provides table of criteria of block trade minimum thresholds for various Company3/Company4 products		543 uniques to the Company3/Company4 tab. More than 2:00 spent on average per visitor. Action search shows over half of visitors choosing to view the table in the provided Excel file
http://www.//	unknown	(Redirect to http://www.//Company X/financial-and-Subject X/description-of-inf-programs.html)		Link takes you to the IDT Programs tab on the Financial and Collateral Management Page. "How the Guide" link is broken and simply bumps user on the same page. Maybe the link should be used to hide the text underneath and make it appear only when a user clicks on it. This tab gets buried in the table, is IDT important enough to warrant its own page? See Line 6	Financial and Collateral Management tab in the Company X section Provides two paragraph summary of Subject Z and then a table on the bottom that provides a wealth of information and pdfs. The tabs are : • Base Guaranty Fund Products • CDS • IRS • Guaranty Fund • IDT Programs • Transaction Timeline • Forms and Instructions		See Line 6 "IDT programs" tab had 272 visitors but only 127 uniques. Seems like users might be ending up back on this page when looking for something else. Could also be due to the broken link on the page.
http://www.//	unknown	(Redirect to http://www.//Company X/financial-and-Subject X/)		This is the link for the Base and Guaranty Fund Products tab on the "Financial and Collateral Management" page. It is a pretty confusing meta title that should be re-written.	See Column F		See Line 6 CDs tab had 116 uniques last month, IRS tab had 182. Average time spent on each was just under 2:00, which is appropriate given the amount of content
http://www.//	text/html	Overnights/Vol Scans for Performance Bonds | Subject Y - Company Group	Subject Y performance bonds requirements for futures and options contracts traded at Company Group including Company2 and Company4 Products.	See Line 23	See Line 23		See Line 23
http://www.//	text/html	Intras for Performance Bonds | Subject Y - Company Group Products	Intras Subject Y on performance bonds requirements for futures and options contracts traded at Company Group. See the listing for details.	Should there be links on the right rail? Shouldn't we keep the "About Subject Y" copy when users click different tabs on the table? See Line 32	Intras tab in the table on the Subject Y page		See Line 23 2,130 uniques to Intras tab. Bounce rate of 15%
http://www.//	text/html	Intras/Intras/Spans for Performance Bonds | Subject Y - Company Group	Subject Y performance bonds requirements for futures and options contracts traded at Company Group. Read the listing for details.		Intras/Intras/Spans tab in the table on the Subject Y page		See Line 23 1,390 uniques to Intras tab.
http://www.//	text/html	Short Option Minimum Performance Bonds | Subject Y - Company Group	Short option minimums for Subject Y performance bonds requirements for futures and options contracts traded at Company Group products.	See Line 32	Short Option Min tab in the table on the Subject Y page		See Line 23 614 uniques to Short Option tab. Under 1:00 time spent per user
http://www.//	text/html	Asymmetric Scans | Subject Y - Company Group	Short option minimums for Subject Y performance bonds requirements for futures and options contracts traded at Company Group products.	See Line 32	Asymmetric scans tab in the table on the Subject Y page		See Line 23 Only 142 uniques to this tab. Perhaps it is just less relevant to users?
http://www.//	text/html	Risk Management Overview - Company Group	Risk Management / Company SPAN overview is outlined. Learn more here.	See Line 7	Risk management page in the Company X section Includes an about risk management description, featured links and three one-paragraph summaries and links to relevant sub-pages on the following categories: • Performance Bonds/Subject Y • Company Market Protections • Risk Management Tools Table on the bottom explains how to purchase and use SPAN		See Line 7
http://www.//	text/html	Collateral Types Accepted for Futures Options and Select Forwards - Company Collateral Management	View standard acceptable collateral. Company Company X accepts a wide range of collateral for deposit into accounts. Including U.S. dollars, select foreign currencies, etc.	See Line 6	See Line 6		See Line 6
http://www.//	text/html	Company X Systems and Operations	Get information on front-end Company X systems. Broker payment systems give-up payments systems and a Company X systems user guide directory. Read the article for an overview.	See Line 22	See Line 22		See Line 22
http://www.//	text/html	Physical Delivery and Cash Settlement Information - Company Group	The Company Group deliveries department administers physical delivery process of exchange-traded commodities: agricultural products and foreign currencies.	Copy has some unnecessary words and phrases that make it very dense. There are simply too many words on this page making it very difficult for users to digest	Accessed through the deliveries link on the Company X dropdown menu Gives a quick explanation of delivery procedures for FC, live cattle and delivery interest rate swap futures Has clickthroughs to sub-pages on the following categories: • Issues and Stops • Cash Settlements • Live Cattle • Registrar Data		2,557 uniques to this page in the last month with 08:50 second average time on page, not nearly enough to read all the content. Only 1 in 50 visitors clicked through to any of the links on the page.
http://www.//	text/html	Audit Department - Company Group	The audit department monitors the capital requirements of Company X members. Details are provided here.	Page is too difficult for user to find. Can only be accessed through the Company X landing page which few users start at. Copy is well-written and well organized Copy is adequate but isn't all that engaging and doesn't say a whole lot.	Accessed through the audit section on the Company X landing page Provides one paragraph explanation of Company's role in regulating Company X members and then gives brief summaries and clickthroughs to sub-pages on the following categories • Financial Surveillance Programs • Joint Audit Committee • Forms		436 uniques, about 30% click through past the audit homepage.
http://www.//	text/html	Company X: Business Continuity - Company Group	Company Group has a comprehensive business continuity management program in place. View additional resources provided by Company Group.	Does this really need to be its own page? It doesn't add much. Very high bounce rate and low number of visitors shows it might be doing more harm than good. Lots of black white space. Could we have a banner or Company X video content if do we decide to keep the page Copy previews on the page are concise and nicely written.	Found by clicking on business continuity mgmt./DR on the Company X landing page Gives quick paragraph on Company's role on protecting its members and stakeholders and links to the disaster recovery process and a longer overview		Only 107 visitors in the last month, second lowest in the whole Company X section Bounce rate of 40% (second highest in the Company X section) shows it is driving a lot of traffic away from
http://www.//	text/html	Company X: Practices - Company Group	View the brief overview to see how Company Company X accommodates special types of trades to meet the business needs of our diverse base.	Page is well-designed and should look nice when updated to follow S.O standards This is a popular page. It should be listed higher up in the Company X drop down menu. Should there be a link to block data from this page since it is under the Company X URL?	Accessed by clicking " practices" tab on the Company X landing page Provides one sentence overview and then links to sub-pages on the following categories: • Block • Allocations • Exchange for Related Positions • Mutual Offset System		Data for this entire section is heavily skewed by the block data section which had over 35,000 uniques in the last month. Though it's URL is listed as Company X, it is actually found under the market data tab. This landing page is relatively popular with 1,233 uniques and bounce and exit rates of under 20%. Additionally, popularity of pages linked to from this page shows that users are clicking through past this page.

Competitive Analysis

A competitive analysis assesses the strengths and weaknesses of a company's current and potential competitors. It shows what content your competitors use to position their products and services or messages they use to demonstrate the value of their organization. A competitive analysis provides insight into how other companies are marketing themselves, and can illustrate missed opportunities and new areas to explore.

Create a Competitive Analysis:

- Ask stakeholders to name their competitors. If the company doesn't have direct competitors (e.g., non-profit organizations), ask what sites they admire.
- Do your own research on competitors. Hoovers.com is a good site to check for competitors.
- Determine companies to look at based on other criteria, e.g., they are not direct competitors but are of a similar type, such as ecommerce sites.
- Review the content, navigation and analytics of competitor sites.
- Give each site a total score (a numerical score, a high/medium/low, or other ranking that is meaningful to you) for the criteria you measured.
- Document competitor information. Your analysis might include information such as company name, revenues, products/services offered, customer segments, homepage information, search, site organization and navigation, link styles and label text, readability, content analysis, original or syndicated content, advertising channels, strengths and weaknesses.

Reference:

Land, Paula Ladenburg. *Content Audits and Inventories: A Handbook*

Best Practice ID	Version	Created	Author	Example ID & Link	Pages
cmp-ase-bp	01.	MAR-2015	CSA-BPC	cmp-ase-xmpl-01	1 of 1

Competitive Analysis Example

	Example Name	Example ID & Version	Phase	Creation Date
CONTENT STRATEGY ALLIANCE	CONTENT COMPETITIVE ANALYSIS EXAMPLE	cmp-ase-xmpl-01	ASSESS	MARCH, 2015

Company Name	URL	Home page	Main Navigational buckets	Navigation	Site organization	Links and labels	Same hand search results	Readability	Content	Content: Original or syndicated?	Is there a mobile site?
List companies that are directly and or indirectly in competition with the content experience, or any content experience or site that may have an impact on your content performance or that may offer insights on improvements and trends.	Main website URL	How informative is the home page? Does it set the proper context for visitors? How fast does it load?	Navigational devices (tabs, links, buttons) that direct the user to the primary pages of the website like: Home, About Us, Contact	Is the global navigation consistent from page to page? Do major sections have local navigations and is it consistent?	Is the site organization intuitive and easy to understand?	Are labels on section headers and on content groupings easy to understand? Are links easy to distinguish from each other?	Is the search engine easy to use? Are there basic and advanced search functions? What about search results? Are they organized and easy to understand? Do they give relevance weightings or provide context? Do the search results remind you what you searched for?	Is the first easy to read? Are line lengths acceptable? Is the site easy to scan, with chunked information, or is just a cold block of text?	Is their sufficient depth and breadth of content offerings? Does the content seem to match the mission of the organization and the needs of the audience? Is there a good mix of in-depth material (detailed case studies, articles, and white papers) versus superficial content (press releases, marketing copy)?	Is the site developing its own content or syndicating other sources?	
NDC Bond Fund Group The NDC Bond Fund Group is a leading multi-national lending company, serving major exchanges as well as a range of financial markets. NDC covers a range of issues, including securities, exchange traded derivatives, commodities, energy, transportation, health and foreign exchange derivatives, interest rate swaps, credit default swaps, as well as warrants. The company works closely with regulators and clients to identify and develop innovative solutions.	http://forexinsurancebond.com	Loads quickly. Sets appropriate context for users. Gives user immediate info on company offerings. Plenty of keywords in intro copy. Has one static banner - cluttered look Has "News" on bottom right - may be misnomer as it is NDC press releases - repeated industry news - when clicked on goes to "Media Center" - nomenclature not consistent Frames included on right side of page too incorporate Twitter postings is clunky - maybe "more" link instead?	Home, About us, Fees, Fund information, Members, Membership and Training, Regulators, Risk management, Rules & regulations or topics Site not titled: Business Streams - ( ) referred to are: Ag, Health and Human services, Commodities, Credit Default Swaps, Derivatives, Energy, Equities, Fixed income, Foreign Exchange, Interest Rates, Exchange rates	Top and side nav offer clear choices on the homepage Top and side nav stays the same. But side nav is not always on top. on/off secondary pages, side nav gets bumped below the fold sometimes	Navigation is consistent.	Top Nav links are confusing. Click on "Regulatory" and "About Us" links are also there. Click on "Margin information" and "Risk Management" links are also there.	Returns include short synopsis of page suggested along with visited URL. Provides check boxes in right margin to narrow search results after return; reminds user of search term requested. Search does not always bring upto top level in returns for the terms being searched. "Risk management" did return entry-level pages.	Uses both right and left margins to deliver content along with slender body area. Sometimes makes content hard to scan. Too many categories on some pages.	Content on home page and About Us too similar. Offers webinars, newsletters; not seeing white papers	Content appears to be original	Appears to be a "runtime" site - looks the same on desktop, tablet and mobile	
THE MEO The Meo is a leading operator that regulates exchanges and clearing houses and serves risk management needs of global markets for all sectors - energy, agriculture, MEO serves customers in more than 200 countries.	www.foreignsuperexchange.com	Loads quickly, sets tone and gives information immediately with content. "Who we are" content is buried below the fold, however, should be elevated. Design is clean and informative. Goodness of frames to lead visitors to desired features. Clean look - used to banner a bit wider than company but about an inch shorter	Products, Markets, Services, About MEO. Appropriate nav nomenclature, and good follow-through on lower pages. Use mega nav as does company	Consistent from page to page. Major sections have local navigation, but is effected and consistent with dropdown from main nav. Uses bread crumbs on right side as user drills down in content.	Site is intuitive and easy to understand. User can readily find information desired.	Links, labels, content groupings all make sense. Links are easy to distinguish from each other. Nomenclature is consistent, user-friendly.	Research provided. Site maps comprehensive.	Font is easy to read. Line lengths are good. Site is very easy to scan and assess information. Content is chunked into digestible pieces, layout is pleasing.	Use of minimal, but consistent images across site pulls together content.	Stat tables to be providing all of own content - no syndication notices available.	
EGOT EGOT is the US global derivatives business of the DAX.	www.foreignsuperagent.de	Home page is informative and provides content, loads quickly. Heavy reliance on images for organizational buckets are not such bold. Looks busy, ineffective for SEO. Suggest graphics that worked together cohesively to reinforce negative instead of random photos.	Markets, News, About us, Products, Connecting, EGOT Markets	Global nav, top and bottom is consistent from page to page. Bottom nav directs user to related network of sites - Corporate, Equities, NASDAQ, Technologies, Nineteen DAX - users also drawn to a link list of these sites at top of homepage, right side of homepage except 2 have drop-down dropdowns that are different than other dropdowns. Dropdowns for buckets list all three dropdowns. But the main header just has, the header for all except dropdowns. But the main header just has, the header for all except dropdowns is less consistent with other navigational buckets not local nav. Flashing banner gives user an idea of the depth of content available on Learning and News. Also, local nav relies upon images to top sets of links - should consider clearer layout. Images not helpful in SEO.	Organization is intuitive and easy to understand. Depth of offerings not immediately evident by organization.	Section header labels are easy to understand, nomenclature makes sense, and content is in appropriate buckets. Links are easy to distinguish from each other.	Search engine is easy to use, delivers anticipated results quickly. Results are found on relevance weighting or filtered. Keywords searched for are carried over to results page. Short summary of pages are delivered with return links.	Fonts are very easy to read, line lengths are appropriate (and users can toggle through if too much for moment) - related to be presented on a page via "Read More" links). Site is easy to scan, content in consumable chunks.	There is a good amount of content on the site for usability. Content satisfies reasonable user requirements. There is an in-depth amount of information available on the site, superficial content (pdf media and corporate and newsroom) is offline on http://www.ne.com/de/de/news.aspx. That site has inconsistencies in nav and presentation.	All content appears to be original, no sourcing is evident.	
DDLG Group DDLG owns and operates 20 clearing houses, and is a central securities depository, spanning 4 continents, making us one of the world's largest exchange company. 100 out of 100 or our markets trade equities. The other 400 trade commodities. We dominate than most are other lines.	www.foreignsuperagency.com	Punctuation error "centrally cleared" Home page assumes user knows what NYSE is - doesn't provide a lot of context. Uses huge images to eat some new "clients." Fast load.	Two tiers of top level nav - are bordered, separate the space, font color, font size and UC and LC (UC use: About Us, Newsroom, Contact Us, Investor Relations on one line; Listing, Transactions, Technology, Corporate Solutions, Services on second line.	Major pressections have local navigation ("sub-menus") but it is not consistent. Navigation can vary within a section, because two (or more) different design treatments are glued together. For instance: www.foreignsuperexchange.com, www.foreignsuperexchange.com. Bread crumb trail is used, but other navigation on the right is lost.	Site organization starts strong and falls apart immediately upon drilling down.	Links and labels, content groupings make sense and are easy to understand.	Search did not always return expected pages for site (input "Services" did not receive top level nav page; input "Contact Us" and delivered all levels of contact vs. pages). Also, when clicking on link returns, several pages either timed out or was not available. Oddly, had data for search returns - All, Listing Center, Investor Relations, Press Releases. Not intuitive to click through those to see if a desired return is underneath those tabs. No relevance weightings but provides brief synopsis for each return; Returns are easy to understand. Search provides keywords as were using in return page.	Fonts are easy to read. Line lengths vary widely, some fine, some too long. Ability to scan ideas ally accurate, ability, some pages run on with huge blocks of text, some are small chunks.	There is a huge depth and breadth of content on the site, but again, because of navigation issues a one drills down, the scope of the content may not be so illicit. Content matches user needs, and mission of organization. Both surface and depth content is fully fleshed out.	Content looks to be original.	Can't emphasize enough the lack of continuity in design and navigation on this site. Looks fat mess. Can tell that it has a lot to offer, but is so easy to get lost and distributed by changes in nav and in look. The Contact Us page offers one lessons in all of this – anchor tags should be used.	
Pyrne Meow Pyrne Meow is one of the world's largest exchanges and offers a range of products, operating the most NU products in the world. Pyrne Meow is an NYSE and PYRNE 100	www.foreignsuperpyrnemeow.com	The home page is clean!	Products, Trading, Market data, Technology, Education, Resources, About us, Contacts, Language. Nomenclature is appropriate for main nav, but is clearly presented below fold, so no access on laptop nav. Dfs concerns navigation at very top of page - Pyrne Meow Groups/Newsroom/Careers/Member Section. These link to another site (and opens another window) which has dissimilar design and nav. Experience jarring - not sure why this nav is considered top level over main site nav. Also, Member Section link goes to a 404 page. Recommendations is to incorporate Resources and Careers into main site, and take Pyrne Meow Groups/Member Section too lower level.	Global navigation is consistent. Breadcrumb trail in place, and well used. Major sections have local navigation, is consistent with dropdown nav on home page. Give odd things unpressed navigation cons at the bottom of each page. Perhaps they are "most used" links or something they want to drive traffic to, but the icons fail to follow navigational consistency of site, and drill down deeper to pages in various, unconnected areas.	Organization is intuitive for user and easy to drill down into content without losing user into site. It has done a good job categorizing a huge amount of information. Some confusing issues arising. Newsroom has gotten at top of site that leads to another site occupied with Newsletter Subscriptions and Circulars under Resources nav link, and News under About Us link in lower navigation. Would recommend all news related publications under one area.	Labels on section headers and groupings are intuitive and easy to navigate and comprehend. A few labels of section heads are not rooted at header of page, consider nomenclature change on page header. Notably: Products link -> Trading the Bonds; Resources link -> Who, What, Why. Pyrne Meow: Under "About Us," Corporate Overview -> Company Overview, Organizational Structure -> Corporate Structure, The Exchange -> Management Board of Pyrne UK	Search engine is easy to use, but not as robust as expected. Input of News does not deliver any of the news pages, but instead returns articles. Search for Glossary does not deliver any results (when there is a Glossary page). Sometimes search delivers a top page associated with search terms, sometimes not. No advanced search is evident.	Font used is easy to read, line lengths are appropriate. Concepts are presented in logical categories, in either graphic or anchor tagged chunks.	The site provides deep content offerings across a wide range. Content matches user needs and goal of company. There is a huge amount of in-depth material, whereas marketing copy and press releases are farmed out to a related site, Eurex Group. Would consider incorporating into one site.	Content throughout site seems to be original content, no references to outside sourcing.	Because of the depth and breadth of content, site uses anchor tags in text to make content more available to the user. Very good usage with long swaths of text, make comprehension and navigation through information much easier for user. Site map buried at bottom of page, not good for SEO. Missing keywords	

Best Practice ID	Version	Created	Author	Template ID & Link	Pages
csd-ase-bp	01.	MAR-2015	CSA-BPC	csd-ase-tmpl1-01 csd-ase-tmpl2-01	1 of 1

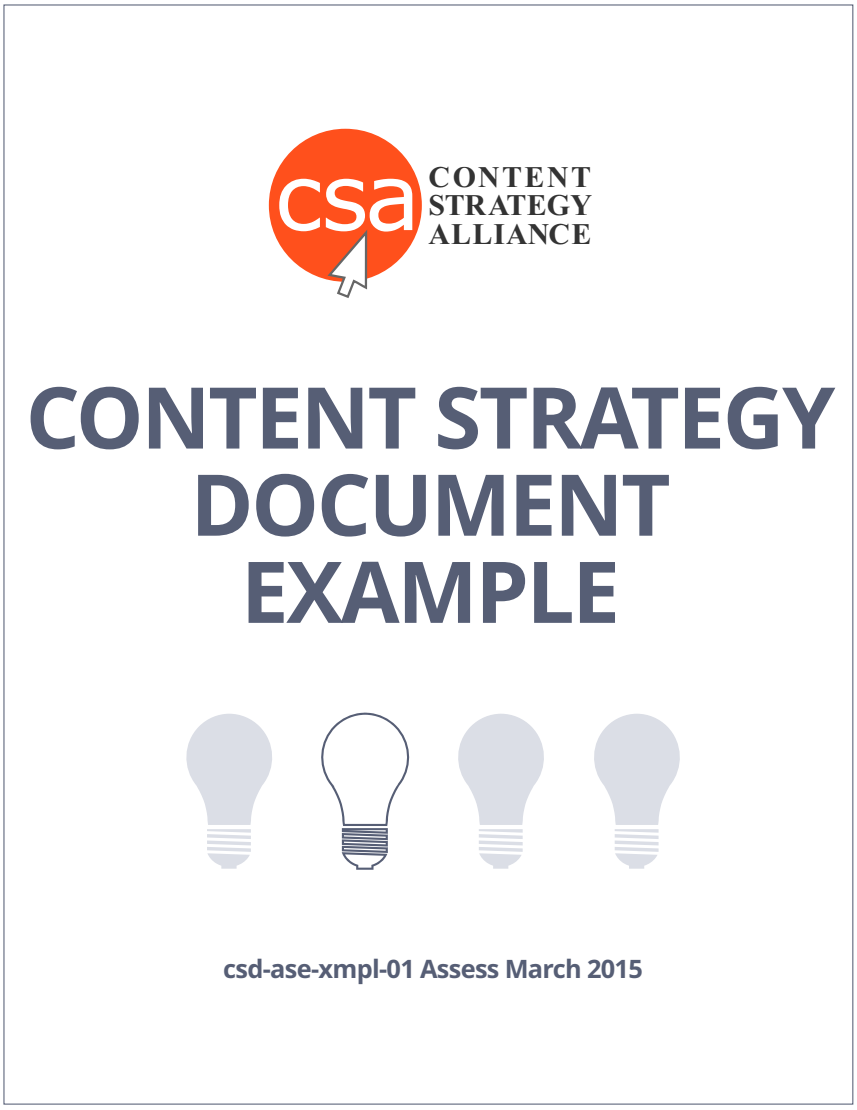
Content Strategy Document

A content strategy document is a master document that ultimately contains the findings of the work performed. It may include the project charter, project brief, voice and tone chart, editorial style guide and others. This will be turned over to the stakeholders for future reference at the end of the project.

Create a Content Strategy Document:

- Begin creating your table of contents in this phase.
- Continue adding new sections and documentation throughout the project as phases and deliverables are completed.

Content Strategy Document Example



Note: This is a multi-page document. To view the entire example, you will need to click on the Example ID & Link above or refer to the “How to use this book” page for further downloading and viewing options.

ANALYZE

Analyzing Phase

n this phase, examine the content critically to determine how it can be improved.

Content Model (High-Level)

"A content model is a tool developed by a content strategist that documents which content will go into an experience and provides nomenclature rules...Projects that need significant rules or logic built into the content – for example to handle personalization, cross-sell, or upsell – require a content model."

UX for Dummies by Donald Chestnut and Kevin P. Nichols

A content model documents the various types of content that needs to be created for a specific project (website redesign, mobile app design, etc.) and when it will be used. It maps these to templates and defines the rules of use for each type, template and module, including back-end development, such as that required for personalization, cross-sell/up-sell, recommendations logic, character limits, modules (called "objects" in a Content Management System) use and reuse, etc.

Ultimately, the content model document will define clearly:

- Content types required for a digital experience.
- System templates mapping to the content type.
- Template fields and modules/objects.
- Rules explaining how content is used and how each field or module should perform.
- Metadata and other tags needed (template, page and module level).
- The structure: what content lies in which template and in what order.

(Note: At this phase, the content model is a high-level structure that includes preliminary content types, and contains recommended future-state content types and requirements for the design work. More work in the design phase is required to flesh out the necessary details.)

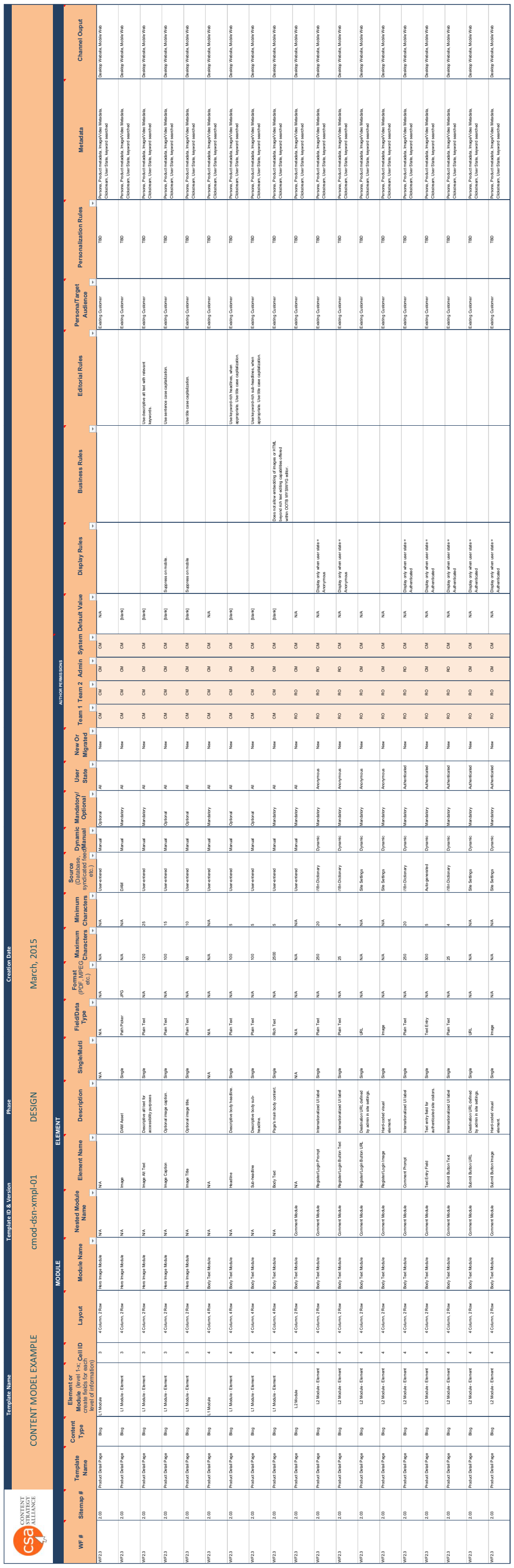
Create a Content Model (High-Level):

- Work with the technology team and a business analyst to decide what fields you need in your content model.
- Create a spreadsheet with the column titles you need.
- Define your content types. If you have an inventory and audit, see what content types were defined there. (You can add more content types if needed during the design phase.)
- When creating the model, emphasis should be on a clear separation of:
  - Raw content
  - Structure
  - Presentation layer (various outputs such as PDFs, HTML or Online Help Guides)

Reference: Nichols, Kevin P. *Enterprise Content Strategy: A Project Guide*

Best Practice ID	Version	Created	Author	Example ID & Link	Pages
cmhl-anl-bp	01.	MAR-2015	CSA-BPC	cmod-dsn-xmpl-01	1 of 1

Content Models (High-Level) Example



Template Name	Template ID & Version	Phase	Creation Date
CONTENT MODEL EXAMPLE	cmod-dsn-xmpl-01	DESIGN	March, 2015

							MODULE			ELEMENT											AUTHOR PERMISSIONS											
WF #	Sitemap #	Template Name	Content Type	Element or Module (level 1-x; create fields for each level of information)	Cell ID	Layout	Module Name	Nested Module Name	Element Name	Description	Single/Multi	Field/Data Type	Format (PDF, MPEG etc.)	Maximum Characters	Minimum Characters	Source (Database, syndicated feed, etc.)	Dynamic/Manual	Mandatory/ Optional	User State	New Or Migrated	Team 1	Team 2	Admin	System	Default Value	Display Rules	Business Rules	Editorial Rules	Persona/Target Audience	Personalization Rules	Metadata	Channel Ouput
WF2.3	2.03	Product Detail Page	Blog	L1 Module	3	4 Column, 2 Row	Hero Image Module	N/A	N/A		N/A	N/A	N/A	N/A	N/A	User-entered	Manual	Optional	All	New	CM	CM	CM	CM	N/A				Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF2.3	2.03	Product Detail Page	Blog	L1 Module - Element	3	4 Column, 2 Row	Hero Image Module	N/A	Image	DAM Asset	Single	Path Picker	JPG	N/A	N/A	DAM	Manual	Mandatory	All	New	CM	CM	CM	CM	[blank]				Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF2.3	2.03	Product Detail Page	Blog	L1 Module - Element	3	4 Column, 2 Row	Hero Image Module	N/A	Image Alt Text	Descriptive alt text for accessibility purposes	Single	Plain Text	N/A	120	25	User-entered	Manual	Mandatory	All	New	CM	CM	CM	CM	[blank]			Use descriptive alt text with relevant keywords.	Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF2.3	2.03	Product Detail Page	Blog	L1 Module - Element	3	4 Column, 2 Row	Hero Image Module	N/A	Image Caption	Optional image caption.	Single	Plain Text	N/A	100	15	User-entered	Manual	Optional	All	New	CM	CM	CM	CM	[blank]	Suppress on mobile.		Use sentence case capitalization.	Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF2.3	2.03	Product Detail Page	Blog	L1 Module - Element	3	4 Column, 2 Row	Hero Image Module	N/A	Image Title	Optional image title.	Single	Plain Text	N/A	60	10	User-entered	Manual	Optional	All	New	CM	CM	CM	CM	[blank]	Suppress on mobile		Use title case capitalization.	Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF2.3	2.03	Product Detail Page	Blog	L1 Module	4	4 Column, 4 Row	Body Text Module	N/A	N/A		N/A	N/A	N/A	N/A	N/A	User-entered	Manual	Mandatory	All	New	CM	CM	CM	CM	N/A				Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF2.3	2.03	Product Detail Page	Blog	L1 Module - Element	4	4 Column, 4 Row	Body Text Module	N/A	Headline	Descriptive body headline.	Single	Plain Text	N/A	100	5	User-entered	Manual	Optional	All	New	CM	CM	CM	CM	[blank]			Use keyword-rich headlines, when appropriate. Use title case capitalization.	Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF2.3	2.03	Product Detail Page	Blog	L1 Module - Element	4	4 Column, 4 Row	Body Text Module	N/A	Sub-headline	Descriptive body sub-headline.	Single	Plain Text	N/A	100	5	User-entered	Manual	Optional	All	New	CM	CM	CM	CM	[blank]			Use keyword-rich sub-headlines, when appropriate. Use title case capitalization.	Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF2.3	2.03	Product Detail Page	Blog	L1 Module - Element	4	4 Column, 4 Row	Body Text Module	N/A	Body Text	Page's main body content.	Single	Rich Text	N/A	2500	5	User-entered	Manual	Mandatory	All	New	CM	CM	CM	CM	[blank]		Does not allow embedding of images or HTML beyond rich text editing capabilities offered within OOTB WYSIWYG editor.		Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF2.3	2.03	Product Detail Page	Blog	L2 Module	4	4 Column, 2 Row	Body Text Module	Comment Module	N/A		N/A	N/A	N/A	N/A	N/A	User-entered	Manual	Mandatory	All	New	RO	RO	CM	CM	N/A				Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF2.3	2.03	Product Detail Page	Blog	L2 Module - Element	4	4 Column, 2 Row	Body Text Module	Comment Module	Register/Login Prompt	Internationalized UI label	Single	Plain Text	N/A	250	20	i18n Dictionary	Dynamic	Mandatory	Anonymous	New	RO	RO	RO	CM	N/A	Display only when user state = Anonymous			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF2.3	2.03	Product Detail Page	Blog	L2 Module - Element	4	4 Column, 2 Row	Body Text Module	Comment Module	Register/Login Button Text	Internationalized UI label	Single	Plain Text	N/A	25	4	i18n Dictionary	Dynamic	Mandatory	Anonymous	New	RO	RO	RO	CM	N/A	Display only when user state = Anonymous			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF2.3	2.03	Product Detail Page	Blog	L2 Module - Element	4	4 Column, 2 Row	Body Text Module	Comment Module	Register/Login Button URL	Destination URL defined by admin in site settings.	Single	URL	N/A	N/A	N/A	Site Settings	Dynamic	Mandatory	Anonymous	New	RO	RO	CM	CM	N/A				Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF2.3	2.03	Product Detail Page	Blog	L2 Module - Element	4	4 Column, 2 Row	Body Text Module	Comment Module	Register/Login Image	Hard-coded visual element.	Single	Image	N/A	N/A	N/A	Site Settings	Dynamic	Mandatory	Anonymous	New	RO	RO	CM	CM	N/A				Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF2.3	2.03	Product Detail Page	Blog	L2 Module - Element	4	4 Column, 2 Row	Body Text Module	Comment Module	Comment Prompt	Internationalized UI label	Single	Plain Text	N/A	250	20	i18n Dictionary	Dynamic	Mandatory	Authenticated	New	RO	RO	RO	CM	N/A	Display only when user state = Authenticated			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF2.3	2.03	Product Detail Page	Blog	L2 Module - Element	4	4 Column, 2 Row	Body Text Module	Comment Module	Text Entry Field	Text entry field for authenticated site visitors.	Single	Text Entry	N/A	500	5	Auto-generated	Dynamic	Mandatory	Authenticated	New	RO	RO	CM	CM	N/A	Display only when user state = Authenticated			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF2.3	2.03	Product Detail Page	Blog	L2 Module - Element	4	4 Column, 2 Row	Body Text Module	Comment Module	Submit Button Text	Internationalized UI label	Single	Plain Text	N/A	25	4	i18n Dictionary	Dynamic	Mandatory	Authenticated	New	RO	RO	RO	CM	N/A	Display only when user state = Authenticated			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF2.3	2.03	Product Detail Page	Blog	L2 Module - Element	4	4 Column, 2 Row	Body Text Module	Comment Module	Submit Button URL	Destination URL defined by admin in site settings.	Single	URL	N/A	N/A	N/A	Site Settings	Dynamic	Mandatory	Authenticated	New	RO	RO	CM	CM	N/A	Display only when user state = Authenticated			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF2.3	2.03	Product Detail Page	Blog	L2 Module - Element	4	4 Column, 2 Row	Body Text Module	Comment Module	Submit Button Image	Hard-coded visual element.	Single	Image	N/A	N/A	N/A	Site Settings	Dynamic	Mandatory	Authenticated	New	RO	RO	CM	CM	N/A	Display only when user state = Authenticated			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web

Personas

A persona is a model of a fictitious personality (e.g., Susan the Surgical Shopper) which represents an archetype of your users' behaviors. Personas often include: age, income, likes, dislikes, marital status, education, etc. It might give examples of how the persona would act in certain situations.

The best personas rely on user interviews, surveys and market research, which ask some of the following questions:

- What are the user's demographics?
- What does a "day-in-the-life" look like for the customer?
- What is the customer's job description?
- How do we solve the customer's pain/opportunity points?
- What are the customer's core values and goals?
- Where does the customer obtain information about our products?
- What are the most common concerns about our services?

Creating a Persona:

- Work with stakeholders to determine their customer base.
- Identify what personas you will create and analyze the user research to pull out significant patterns.
- Include information such as name, stock photo, age, ethnicity, income, location, job title, education, marital status, number of children, religion, political affiliation, industry, user segment (if defined), purchase behavior, typical device profile, typical social media profile, decision maker (yes or no), goals, pain points, opportunities, barriers and quotes.
- Share personas with stakeholders and others to determine if they are accurate.
- Decide how the personas will be used for the project and ongoing purposes.

Personas Example

Pre-Sales Audience 1

Advancer

Jump In And Figure It Out

I want to spend my time working, not messing around with how our practice runs. When it comes to products and services, I want to choose them quickly, get them in place, make them work smoothly, and get back to work.

I focus my research time on key things for our practice. Based on conversations with my doctors, I have a few requirements in mind, and I match those to the available options.

I try to really get to the heart of the matter quickly. I don't want all the mumbo jumbo. When there's a problem with a service or a product I've purchased, I get the right people on it so it's resolved as fast as possible.

Name: Joe Taylor

Quotes:

"I don't think it can be implemented without a clinical background. Our IT guy tried to do it and failed, but I was able to figure out how to set up templates in the system because of my clinical background."

"I really don't think the sales person has my interests at heart. He's just interested in the sale, and I've gotten bad information in the past. Now I check what the sales person says myself."

"Generally other people in the office call me when they need help. I don't manage the system but I figured out how to set it up on my own, and can usually solve most of the problems people are having."

The Way I Work:

- Show me where I need to go to just get started
- Figure out ways to work more efficiently
- Feel my clinical background is critical to implementing the system correctly (IT guy failed)

My View on Learning:

- Take pride in figuring it out myself
- Watch webinars to learn about the system/watch videos/read white papers

How I Get Help:

- Dig into the issue myself by trial and error to figure out a problem
- Call support and buy a support ticket if I cannot solve the problem

My View on Research:

- Ask people around me socially to see what others in my community have done
- Attend session conferences to learn ins and outs
- Dive in and figure it out on my own

What Makes Me Comfortable:

- Feel my personal experience is the best guide in deciding
- Rely on the trust I have in people I know if my personal experience doesn't tell me

What Frustrates Me:

- Feel annoyed the government is telling me how to run our practice
- Believe salesperson is interested in a sale, not my needs

Pre-Sales Audience 2

Reluctant Adopter

Worried Impact Will Outweigh The Benefits

I'm afraid the more complex systems will steal our focus from patients. If it's a simple service that has worked for years, great. I'm afraid we will lose time bringing up a fancier system or service, and if it fails, we'll lose time fixing it.

I'm afraid we'll spend too much money on it and see very little improvement. I'm afraid it will affect my relationships with my patients. I need to see the salesperson walk through my scenarios to see how it works, and to make sure it fits my practice.

I worry complex systems and services will come with problems and will consume time and money down the line.

Name: Bill Anderson

Quotes:

"My job was primarily to talk about what sort of clinical tools I'd like to have available and what would be a reasonable expectation for the amount of training and how much productivity could we tolerate losing while we made the transitions."

"I'm not all that good at finances. But we saw how much it cost in similar sized practices in the area, and this came in plus or minus ten percent."

"My office manager really worries if it will be able to maintain all the necessary confidentiality and still be able to provide information to other institutions as necessary."

The Way I Work:

- See evidence in other practices that it works- and isn't messing their practice up
- Pass all non-Doctor issues to practice manager when they're not my area
- Make a paper backup just in case- don't totally trust the system

My View on Learning:

- Feel really nervous about how to get started
- Pick up the phone and call support right away if there is a problem
- Feel concerned about the training/ramp-up time for a new system

How I Get Help:

- Tell the practice manager in charge of the system if there is a problem
- Ask my IT consultant to resolve the issue

My View on Research:

- Believe that someone else's experience is more credible than a salesperson
- Recognize I'm not the expert in looking for a system
- Research best practices for setting up template guides

What Makes Me Comfortable:

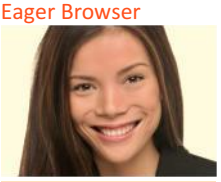
- Feel really comfortable having someone tell me exactly where to get started

What Frustrates Me:

- Worry that my bad typing will slow me down
- Worry that I may lose my patients data and that my practice will come to a halt
- Worry it's going to get between my relationship with my patients

Pre-Sales Audience 3

Eager Browser



Make It The Best

I'm interested in the benefit the system or service will bring to the practice. I want the most improvement possible, so I'm willing to take the time to make the right decision. I gather requirements through a lot of internal discussions and validate them by talking to others.

I formally ask other practices about their experiences and will go to their practice to see how their system works. When the service or system has a problem, I take the time to find out what caused it. I want the problem resolved correctly the first time.

I'd rather spend more time up front choosing the right system than live with the wrong decision later.

Name: Millie Carter

Quotes:

"What I've done is try to talk to other people who had kind of similar arrangements or similar practice patterns and talk to them and their experience with the company and their responsiveness to complaints and issues and trying to work around- or to improve the product."

"I do go over how the purchase is going to impact on my support staff then I'll kind of go over the ideas and kind of solicit their feedback. But in general I'm kind of the final bottom line is ultimately gonna be my decision."

"When we implemented the electronic medical record we had somebody on sight for ten days to get everybody up and running and familiar with the software."

The Way I Work:

- Hold meetings with the practice to discuss what we're going to do
- Figure out ways to work more efficiently
- Feel comfortable letting my partners decide

My View on Learning:

- Call salesperson for demo first rather than look online
- Ask tech-savvy nurse when there are problems

How I Get Help:

- Call support to get to the root of the problem, paying extra if I need to

My View on Research:

- Decide to start looking because of incentives
- Get recommendations from other physicians
- Use stimulus funds to implement

What Makes Me Comfortable:

- Feel assured my vendor will be on site to work with me when I implement their product
- Get acclimated system slowly by using it for first/last patient of the day

What Frustrates Me:

- Feel frustrated when people showing me the technical capabilities rather than its practical capabilities
- Recognize it may be harder for me to get up to speed because I'm older

User/Customer Journey

A user/customer journey is a step-by-step path a user may take to reach their goal when using a particular website, app, etc. It can be documented in MS Excel or MS Word, but presented later in a flow diagram or a chart if needed.

Users might be tested to see what decisions they make about what to do next to get to their goal. This information is then used to design an ideal user/customer journey that allows the user to achieve goals as quickly and easily as possible. The final experience should combine user and business goals.

Create a User/Customer Journey:

- Define the users who benefit from a user/customer journey. Have stakeholders identify users in an informal way, or document them in personas.
- Identify the task or goal of the user, e.g., buying a product, cancelling their cable service, finding out store hours, etc.
- Map out the path/steps the user takes currently within the user experience to complete the task, or map out how the user could complete the task.
- Document if the user had or could potentially have problems completing the task.
- Come up with solutions ("What can we improve?") to make the user/customer journey easier and more successful.
- Be sure that the business goals are being balanced with the user goals.

User/Customer Journey Example

Example Name	Example ID & Version	Phase	Creation Date
User Journey E-Commerce Example	usj-anl-xmpl-01	ANALYZE	MARCH, 2015

Persona/User Profile

User/Customer: Mom of 3 kids
Task/Need: telecom services for her family
Identify path to achieving need: researches choices on the website, selects choice, buys services

	STEP ONE	STEP TWO	STEP THREE	STEP FOUR	STEP FIVE	STEP SIX
USER/CUSTOMER ACTIONS	User views choices on the website: cable, phone, internet	User has questions and uses "Chat"	User selects a "bundle" with cable and internet	User fills out billing info	User clicks "Buy"	User reads confirmation of purchase
WHAT THE USER/CUSTOMER EXPERIENCES	User is initially confused	Chat rep answers questions	User sees their choice accepted	User did not want billing info saved for the future	User sees their purchase accepted	User is not sure when the service will be started
WHAT CAN WE IMPROVE?	Make options clearer to the user	Chat rep could suggest services and options	User could be alerted to other services and offered a discount	Ask user if they want their credit card info saved	N/A	Tell user they will receive a follow-up email with start date

User/Customer Journey For Omnichannel

Multichannel & Omnichannel Defined

Multichannel means to publish content to more than one channel.

Omnichannel is a multichannel strategy that puts the user at the center of a brand experience, and looks at all channels the user interacts with, how often and where. It looks at all content published by a brand or organization to see how a user consumes it and uses it to accomplish or complete a task. The goal is to create a seamless customer experience, regardless of the channel or device employed.

Omnichannel User/Customer Journeys

When a customer moves through different channels to purchase a product, what is the end-to-end life cycle from the moment a customer begins that process? One scenario may be viewing an ad on television, conducting research on a desktop, pulling a map of the store on a smartphone, scanning a QR code, sharing the experience socially after purchasing the product and receiving emails after registration.

Create an Omnichannel User/Customer Journey:

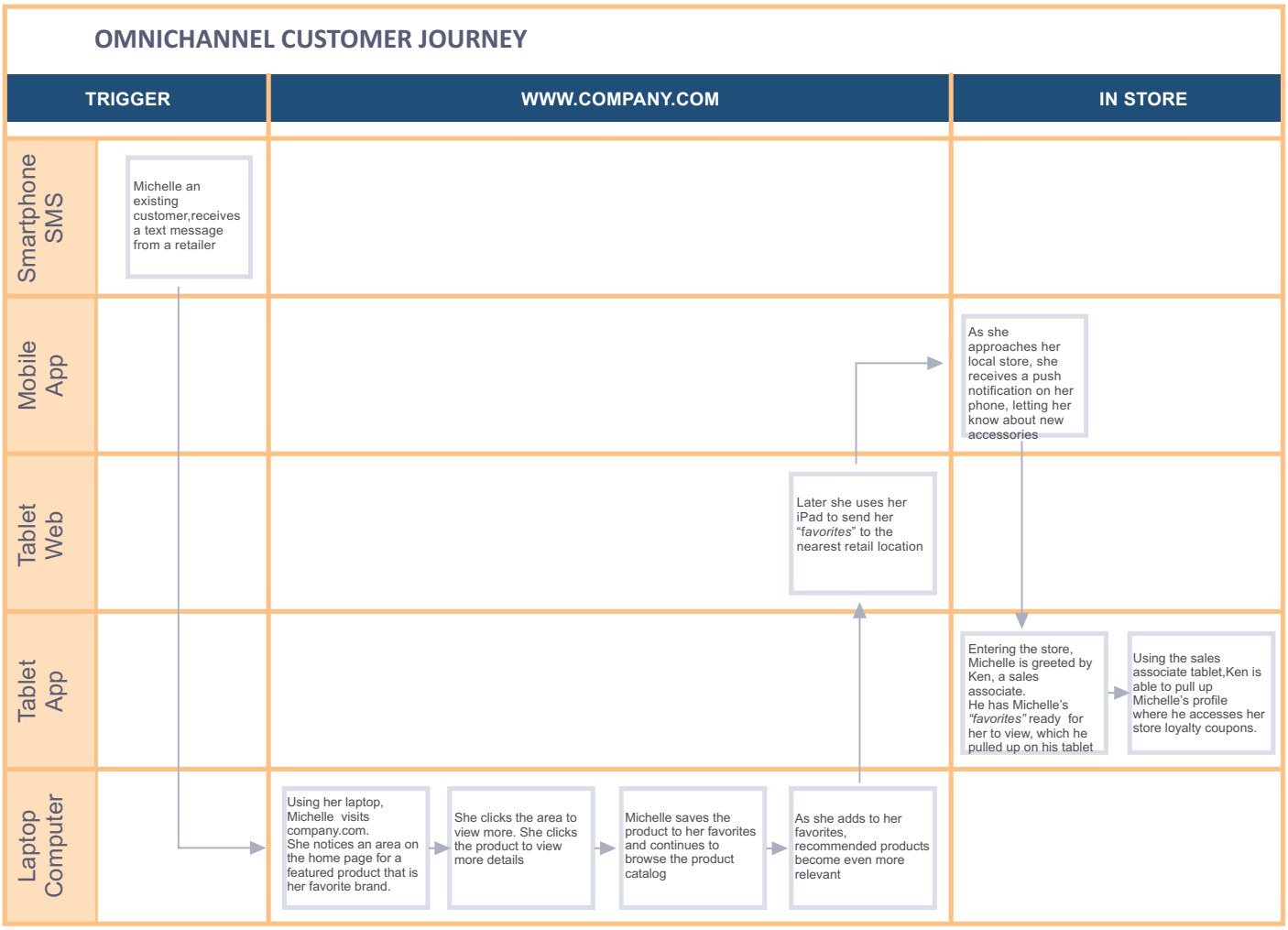
- Define the overall customer life cycle (e.g., use personas to document steps in the customer journey).
- Know what channels your users engage in: computer, smartphone, tablet, in-store (signage, kiosks, etc.), publications, TV, radio, product packaging (includes the label, box, user guides/manuals), gaming consoles.
- Ensure a consistent customer service experience across channels (e.g., develop messaging that addresses use cases and behaviors).
- Clearly set customer expectations for what their experience will be.
- Regularly measure the customer experience to determine how it can be improved.

Reference:

Chesnut, Donald & Nichols, Kevin P. *UX For Dummies*
Nichols, Kevin P. *Omnichannel Content Strategy: A Content Experience Approach*

Best Practice ID	Version	Created	Author	Example ID & Link	Pages
usjo-anl-bp	01.	MAR-2015	CSA-BPC	usjo-anl-xmpl-01	1 of 1

User/Customer Journey For Omnichannel Example



Content Map

Customer Life Cycle Content Map

A content map (customer life cycle) is a document that aligns content to the steps or stages in a user/customer journey. When the content is gathered and analyzed, you can find the gaps where the content isn't fulfilling the user's needs.

The purpose is to make sure that the user/customer has the necessary content at each step or stage of the journey to help move from awareness to action.

High-Level Content (Tree) Map/Domain Model

The high-level content map, or domain model, is a tool to help governance committees, decisions makers and primary stakeholders understand where their content is, from a functional perspective. The information is grouped into logical categories, with all channels (e.g., in-store, website, etc.) considered.

This grouping does not represent taxonomy, but a domain model that captures where different themes or topics of content live within a larger ecosystem. Domain models are effective in visualizing a current-content ecosystem and current-content model at a high level. These can also represent a future-state model.

Create a Content Map (Customer Life Cycle):

- Define the user/customer journey.
- Map the appropriate content to the steps or stages the user/customer goes through in a user/customer journey.
- Look at analytics as you follow the user/customer through the steps or stages to be sure you have all the content the user needs.

Create a High-Level Content (Tree) Map/Domain Model

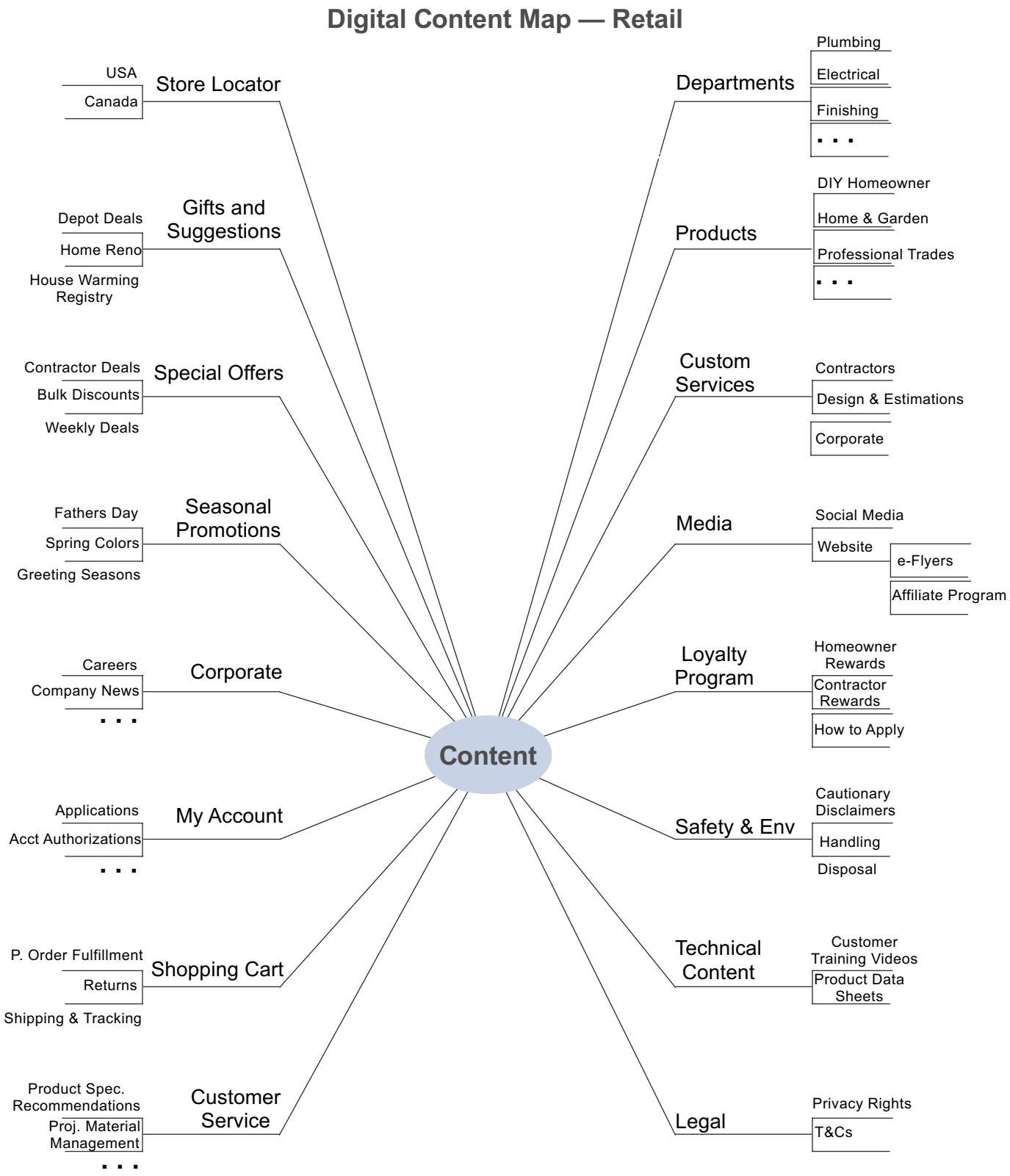
- Brainstorm about what content you need for the project.
- Lay out your content in a "tree" form, deciding where content belongs in relation to the other content.
- Create content groupings under specific headers (could be areas of a website).

Content Maps (Customer Life-Cycle Stages) Example1

CONTENT STRATEGY ALLIANCE	Example Name	ID & Version	Phase	Creation Date
	Content Map	cmap-anl-xmpl1-01	Analyze	March 2015

Persona	Life-Cycle Stages				
Noreen Smith Marketing Manager 	**Awareness** Or Discovery	**Interest** Or Research	**Desire** Or Prospecting	**Action** Or Opportunity	**Post-Purchase** Or Consumer Advocate
	Content examples for one persona				
Type of Buyer: Needs to buy new software for her company	• Industry blog • Social media communities • General how-to videos • Industry white papers • General purpose eBooks • Advertising • Trade shows	• Company blog • Overview brochure • Specific how-to videos • Best-practices white papers and eBooks • Webinars	• Product/service videos • Webinars - specific • Product/ service brochures • Limited product trial • Online vendor demo • End user testimonial videos • Case study white papers • Vendor comparisons • Personal emails	• Product/service videos • Webinars - specific • Product/ service brochures • Limited product trial • Online vendor demo • End user testimonial videos • Case study white papers • Vendor comparisons • Personal emails	• Upgrade offers • Onboarding documentation • Customer satisfaction survey • Customer retention communications

Content Map (Tree Map) Example2



Taxonomy Recommendations

Taxonomy is a hierarchy of terms used to categorize and label information (e.g., the Dewey Decimal System and science groupings of kingdom, phylum, class, order, etc.)

When used within a digital experience, taxonomy classifies content and shows the relationship between different types of content (e.g., a product hierarchy might be: shoes-women-1"to 3" heels).

At this stage, the content strategist will offer recommendations on the taxonomy. Later, the full taxonomy will be developed with a taxonomy expert (may or may not be the original content strategist) and others.

Create a Taxonomy:

- Group together similar items into broad buckets or topics, which are then grouped into even broader hierarchies. Use the results to provide a conceptual framework for discussion, analysis or information retrieval.
- Consider implementing a pre-existing industry standard (e.g., DIA reference model, Dublin Core).
- Define the list of terms you need to order or categorize (e.g., products).
- Consider your users' needs and interests (e.g., do your users value brand over price?)
- What are the terms users use to search?
- Determine similar terms that could be used for each term (e.g., a "sub" sandwich could also be a "hero").
- Depending on your digital experience's business requirements, decide on the taxonomy to be used, for example: subject, concept, content type or a combination. Group similar information (e.g., under "makeup" you might have lipstick, foundation, mascara).
- Create necessary categories and subcategories.

Taxonomy Recommendations

Validate with:

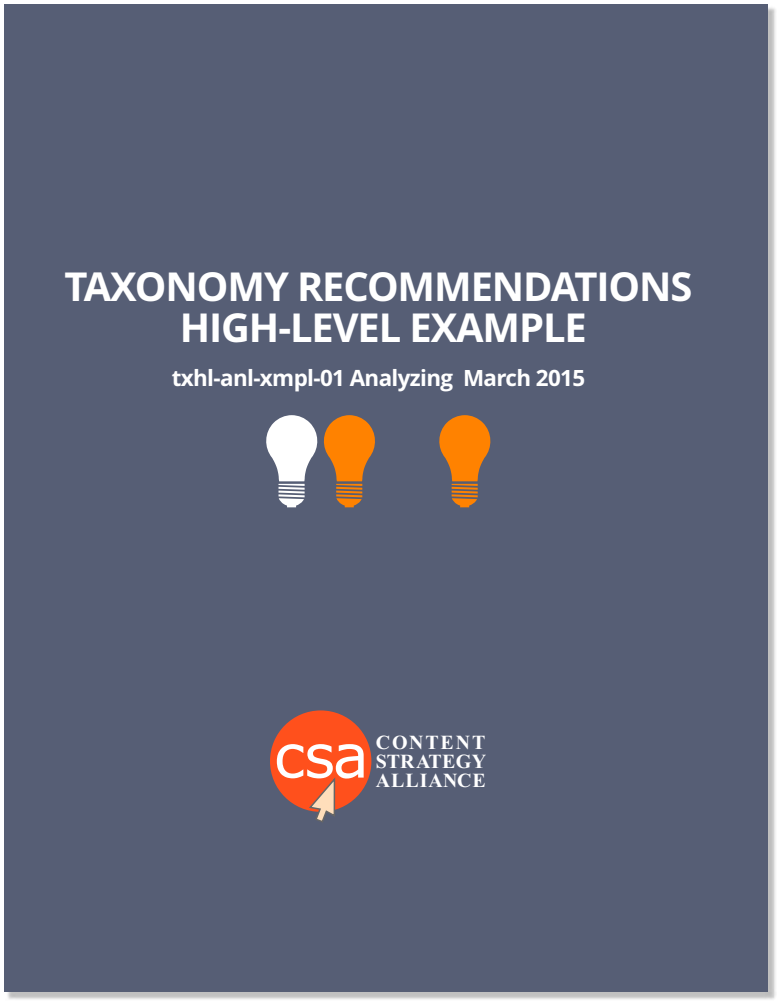
- Card sorting — a user experience design technique that asks users to arrange index cards to aid in defining navigation and nomenclature (naming) for a website or other application.
  - Give a set of index cards with categories/terms to the participant.
  - Have the participant put the cards into what he or she considers logical groupings, and name each grouping.
- Tree testing or reverse card sorting — a user experience design technique that asks users to go through a navigation in list form to test a site map, taxonomy or navigation system.
  - Give the participant a task and ask him or her to complete it by going through cards with subcategories related to a category.
  - The participant needs to arrange the cards in the order that will best help his or her complete the task.

Reference:

Hlava, Marjorie M.K. *How to Build a Taxonomy 101*
Hedden, Heather. *Accidental Taxonomist*

Best Practice ID	Version	Created	Author	Example ID & Link	Pages
taxr-anl-bp	01.	MAR-2015	CSA-BPC	txhl-anl-xmpl-01	1of 1

Taxonomy Recommendations (High-Level) Example



Note: This is a multi-page document. To view the entire example, you will need to click on the Example ID & Link above or refer to the “How to use this book” page for further downloading and viewing options.

Content Migration Plan

The content migration plan is an approach for moving content from an existing system to a new system. An effective migration strategy involves all stakeholders and content owners from the beginning of migration planning and includes a content inventory that qualitatively and quantitatively evaluates existing content. It also includes a tracking system that uses the content inventory or content matrix to detail: revision dates, content owners, metadata and other information about the content.

Create a Content Migration Plan:

- Review the content inventory and audit.
- Be on the lookout for content using older technologies such as Flash, which may present some challenges.
- Determine which content will be migrated and which will be phased out/deleted. Be sure to consult your content audit and check the analytics to see which pages yield higher page views as this information will help to inform your decisions.
- Create a content matrix and from it, identify which content can be migrated into the new design versus where new content is required. Use this as a content-tracking system.
- Work with the technology team to come up with a migration approach (e.g., automated versus manual).
- Consider using migration tools that are appropriate for your content.
- Determine if a staggered migration approach makes sense.
- Work with a project manager (PM) to determine timing, resources required and to finalize the approach.
- Initiate a freeze on new content being added for about two weeks before launch.
- Test redirects and have SEO experts check for any problems or opportunities.
- Use a tool such as one of the below to check load times and find any problems:

  http://tools.pingdom.com/fpt
  http://www.websiteoptimization.com/services/analyze

Reference:

Buckley, Phil. *The Ultimate Website Migration Checklist*
Nichols, Kevin P. *Enterprise Content Strategy: A Project Guide*

Best Practice ID	Version	Created	Author	Template ID & Link	Pages
cmig-anl-bp	01.	MAR-2015	CSA-BPC	cmig-anl-xmpl-01	1of 1

Content Migration Plan Example

Note: This is a multi-page document. To view the entire example you will need to click on the Example ID & Link above or refer to the “How to use this book” page for further downloading and viewing options.

DESIGN

Designing Phase

In this phase the deliverables that are the core of the design will be created. You will do a deeper design of the future-state content solutions for all aspects of the content ecosystem. Work will be done to streamline and align the content workflow and approval processes, ensuring the proper structure and processes are in place to create, maintain and govern your content over time.

Messaging Statements

Messaging statements are strategic phrases that express the voice and brand personality, and may give information about the subject matter being discussed. This work provides direction to marketing and creative teams for the content development processes. The messaging statement should be used in concert with the voice and tone guide.

Often they summarize the insights from research conducted by the creative or strategy teams, and they may be informed by a company's positioning statement. Messaging statements are not necessarily taglines, although in some cases these statements are. Elements of the phrasing may be used verbatim by the copywriter, but not always.

Create Messaging Statements:

- Work with the brand specialist and possibly a digital strategist to determine the main messages. You may be able to get valuable direction during the stakeholder interviews by asking stakeholders to describe what they think is the brand message.
- Define what type of response you want from the messaging: do you want your user to think, feel or act?
- Define the objective of the messaging: brand awareness, gain knowledge, buy something, etc.
- Incorporate these messages into the content creation guide to aid in the copywriting process.

Reference:

Bloomstein, Margot: *Content Strategy at Work*

Messaging Statements Example

Example Name	Example ID	Example ID & Version	Phase	Creation Date
Messaging Statements Example		mess-dsn-xmpl-01	ANALYZE	MARCH, 2015

Type of Response Wanted	Messaging Objective	Messaging Statement	Notes & Comments
Think; Act	Get informed; Seek out this drug therapy.	Safe, simple, and proven results.	
Act	Seek more guidance.	Financial help is available - what are you waiting for?	
Think; Act	Convince consumer the particular drug is more affordable than the consumer might think it is.	Minimize financial concerns when considering treatment with this drug.	
Think; Act	Convince consumer the particular drug is more affordable than the consumer might think it is.	99% of people who have health insurance, including Medicare, are covered for this drug.	
Think; Act	Convince consumer the particular drug is more affordable than the consumer might think it is.	You may be able to save up to $1,000 on your out-of-pocket cost for treatment that uses this drug.	
Think; Act; Feel	Get customer to consult with a medical professional and take action to improve the his or her health and where drug therapy is viable option.	If you have been living with X condition for too long, it may be time to talk to your doctor about this drug to see if this drug is right for you.	

Voice and Tone Guide

Two important elements of content strategy are tone and voice. A well-defined tone and voice in your written content can help create a consistent experience for your readers. A voice and tone guide provides guidelines for authors to help them achieve a uniform style, adapted as necessary to the audience and content types. It may include writing examples to illustrate how to apply the voice and tone guidance.

Think of voice and tone as the content's personality and style. The extent of personality and style that is conveyed depends on the context (a speech, video, website, etc.), the audience (size, demographics) and the goal of the content (sales, entertainment, information, etc.).

Just as how you speak depends on the context and the audience, different kinds of writing may have a specific voice and tone. A sales-driven product description should sound and read differently than an answer to a technical question.

Some say voice and tone are the same thing, and others say they are different. We believe differences exist between the two, but acknowledge that each should achieve the same purpose of portraying the uniqueness of your brand.

Definition of Voice:

The more technical of the two, voice is about the execution of the content. It is conveyed through the use of person (first, second or third), vocabulary (simple versus technical) and word length.

Definition of Tone:

Tone is the emotional element that conveys the attitude of a site: how upbeat, serious, humorous, etc.

Create a Voice and Tone Guide:

- Decide if you will use first, second or third person.
- Make a list of words that describe your brand. Decide if you are going for simple or more complex words; technical or plainer speech.
- List the emotions you want to convey: humorous, upbeat, serious, etc.

Reference:

Gilbert, Kevan. GatherContent Blog: *A Simple Tool to Guide Tone and Voice*

Voice and Tone Guide Example

	Example Name	Example ID & Version	Phase	Creation Date
CONTENT STRATEGY ALLIANCE	VOICE AND TONE GUIDE-EXAMPLE	vtg-dsn-xmpl-01	DESIGN	MARCH, 2015

Persona/Target Audience	What adjectives/emotions describe your brand personality?	What adjectives describe your tone?	What person will you use? (1st, 2nd, 3rd)	Technical or plain speech?	Simple or complex words?
Young Families, educational financial product users	Collaborative	Helpful	2nd	plain	simple
	Responsive	Engaging			
	Empowering	Trustworthy			
		Supportive			
		Personable			

Editorial Style Guide

The purpose of an editorial style guide is to provide a set of standards for authors when writing and designing content that will result in consistency in look, feel, voice and tone throughout the project. Many organizations will adopt a style guide for grammar such as the AP Stylebook and then list any organization-specific modifications to this standard style.

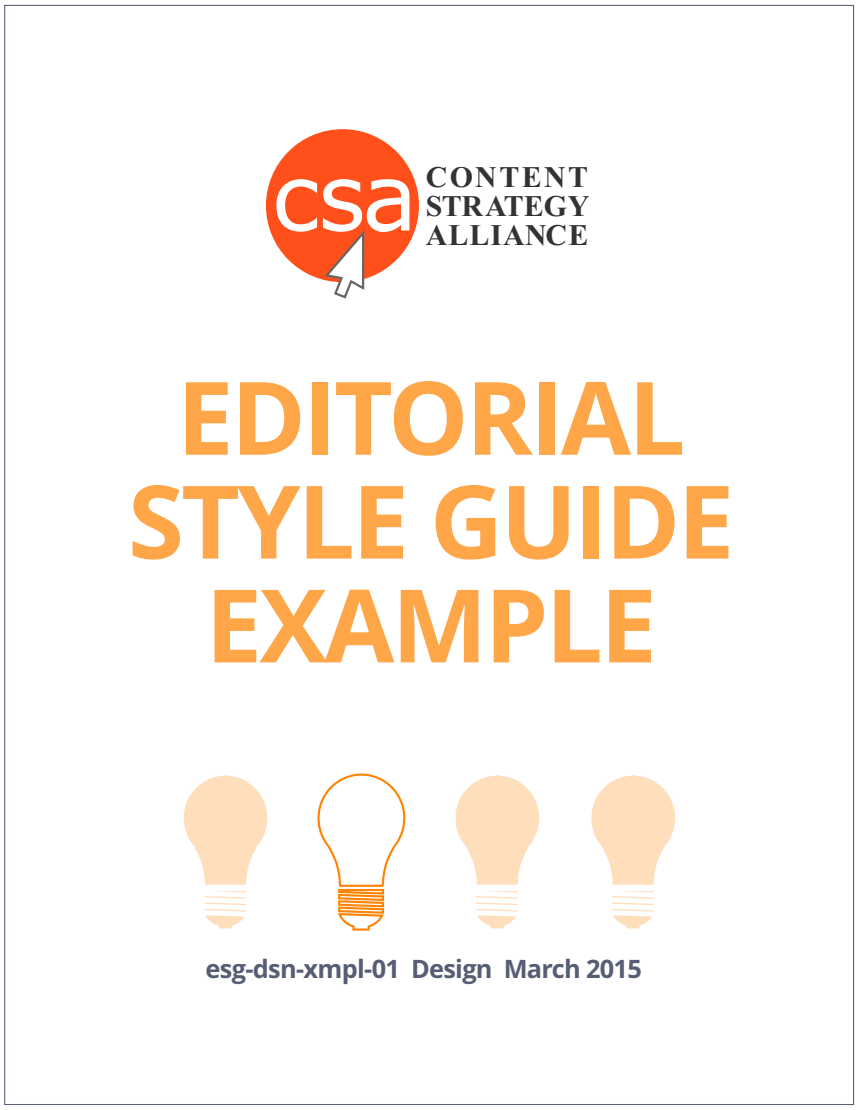
Style guides may address general best practices for writing for each channel the organization publishes to, guidance for how to write for different audiences, legal and brand guidelines, grammar and usage guidance, preferred spelling of terms and a glossary.

Create an Editorial Style Guide:

- Review all the documentation that already exists, including branding guides, messaging and existing style guides (e.g., visual, voice and tone).
- Update existing documentation to reflect current standards.
- Incorporate into a comprehensive document.
- Get buy-in from your governance committee so the guide will be used and constantly updated.

Best Practice ID	Version	Created	Author	Example ID & Link	Pages
esg-dsn-bp	01.	MAR-2015	CSA-BPC	esg-dsn-xmpl-01	1 of 1

Editorial Style Guide Example



Note: This is a multi-page document. To view the entire example, you will need to click on the Example ID & Link above or refer to the “How to use this book” page for further downloading and viewing options.

Experience-Level, Page-Level and Page-Type Level /Strategic Intent Document

Experience-level, page-level and page-type level/strategic intent documents define the goals and objectives of the content and inform the strategic rationale. You can develop these at the experience level, individual-page-level and page-type level (home page, section pages, etc.)

(Note: The content creation guide (CCG) may also contain information included here. Depending on the project, you can combine the page-level/strategic intent document with the CCG.)

Create an Experience-Level Type/Strategic Intent Document:

- Draw from the business goals and objectives, and the project goals and objectives to define the goal and objectives of the page. Generally, the page will have one goal with several objectives. (e.g., Goal: Sell more products than any other website within the category. Objective: Sell X amount of X products within X timeframe.) The goal is the aim while the objective is specific and measurable.
- Define the target audience, which could be a persona, segment or user targets. You will most likely have more than one per page, and each objective will most likely have specific targets.
- Define the strategic intent, which answers the questions of "Why?" For example, for a home page of a website, you might say that the reason for the homepage is to answer the question of "Why this company for the consumer, potential customer, existing customer, career seeker, investor and analyst?"
- Define the channels where the content will reside or surface.
- Prioritize the types of content that are required to meet the above four points.

(Note: these above questions may be defined in the content brief or the content audit instead of a separate document.)

Create Page-Level or Page-Type Content/Strategic Intent Documents:

- In addition to the information above, you may add this information to page-level or page-type strategic intent documents:
  - Related content that can be linked to the page.
  - Person responsible for creating the content.
  - Person responsible for managing/updating the content.
  - How often the page will be reviewed.

Experience-Level, Page-Level and Page-Type Level /Strategic Intent Document Example

Example Name	Example ID & Version	Phase	Creation Date
EXPERIENCE-LEVEL, PAGE-LEVEL & PAGE-TYPE-LEVEL/STRATEGIC INTENT DOCUMENT EXAMPLE	plcs-dsn-xmpl-01	DESIGN	MARCH, 2015

PAGE TITLE: Hospitality Offerings

Page Subject Tags: Hospitality, Hotels, Bed and Breakfasts

What is the intent of this page? (why this page exists, e.g., to show new products or answer questions about the organization)	Show best-of-breed, industry-leading solutions targeting large hospital chains, independent hotels, motels, and bed-and-breakfasts
Who is the target audience for this page? (e.g., which personas or customer segments)	Owners of small to medium hotels, motels and bed and breakfasts; hotel associations; and large hotel corporations.
What is the objective for this page? (what it needs to accomplish, e.g., explain the differences between products or get people to put item in shopping cart **)**	Get small hospitality businesses to understand our offerings and sign up.
What types of contents will be used to achieve this objective? (e.g., video, testimonials, articles, photos) Prioritize them.	Customer testimonials, videos, blogs.
What is the call-to-action? (what you want people to do after viewing this page)	Sign up for services.
What is the metacontent for this page? (what shows up in search engine results – e.g., keywords, description, title)	In-room entertainment, guest experience, home away from home
What other channels will feature this content in addition to this page?	Emails
What related content can be linked from this page?	Links to our other technology offerings
Who is responsible for creating the content on this page?	Web marketing department.
Who is responsible for managing/updating the content on this page?	Web marketing department
How often should this page be reviewed for a possible update?	Monthly.
Metrics: what criteria will be used to show the success of this page?	Page views, conversions.

Content Types

"A content type is an information asset. It is an abstraction that captures the essential characteristics (attributes) of content that distinguish it from all other kinds of content."
—Cleve Gibbon, Content Modeling Content Types

Content types structure and store chunks of information. Content types represent main content categories and are important components of content deliverables, including taxonomies, content models and content life cycles (different content types may possess different life cycles).

Content types include: annual reports, biographies, calendar or event listings, contact information, email, FAQ, forms, images, index, glossary, table of contents, infographics, instructions, legal disclaimers, maps, news/announcements, blogs, podcasts, webinars, press releases, product details, support or help, product user guides, user-generated content, tutorials, videos, white papers, etc.

Create a list of content types:

- Identify the content types involved in your project. Refer to your content inventory and other documents that may have identified content types.
- Brainstorm with the content team (be sure to include a copywriter) and an information architect to identify other content types.
- View competitors' websites and marketing collateral for additional content types.
- Document your initial list and get stakeholder approval.
- Continue to add new content types if needed as you go through the project.

Reference:

Nichols, Kevin P. *Enterprise Content Strategy: A Project Guide*

Best Practice ID	Version	Created	Author	Example ID & Link	Pages
ctyp-dsn-bp	01.	MAR-2015	CSA-BPC	ctyp-dsn-xmpl-01	1 of 1

Content Types Example

Example Name	Example ID & Version	Phase	Creation Date
CONTENT TYPES EXAMPLE	ctyp-dsn-xmpl-01	DESIGN	Mar-15

Internal	Content Type	Notes and Comments
	Audio	Not longer than 3 minutes
	Video	Not longer than 3 minutes
	Metadata	Work with taxonomy expert
	HTML	
	Image	
Customer Facing	**Content Type**	**Notes and Comments**
	Annual Report	Revised from print
	Articles Page	
	Biographies	
	Blog Post	
	Case Study	Need to create
	Company Policies	
	Contact Info	
	FAQs	
	Forms	
	Glossary terms	
	Help Content	
	Infographic	
	Instructions	
	Legal Disclaimer	
	Log Out Information	
	Manual	
	News	
	Podcast	
	Press/News Release	Marketing will supply
	Product Category Page	
	Product Detail Page	
	Product User Guide	
	Questions & Answers	
	Reviews	
	Tutorials	
	Webinars	

Content Matrix (General)

Practitioners use the term 'content matrix' differently. In our experience, a content matrix refers to a spreadsheet that maps all the content that will surface within a front-end solution. Often a content inventory and a content audit/assessment evolve into the content matrix; these documents will provide many of the core elements. You can use this tool to drive decisions that impact content management structure and implementation, content migration and page development. Often developers use a content matrix to build the solution.

(Another type of matrix is the content development matrix, which manages the new content creation process.)

Note: You should call out all fields and content elements identified in wireframes within the matrix. You cannot finalize the matrix until the design of the page, including wireframes and functional specifications, is closed.

Create a Content Matrix (General):

- Start with the content inventory and the audit/assessment and pull out any known content that will reside in the future-state design.
- As the information architect fleshes out wireframes, and as the page-level strategy is defined, take the information from what you know will go into a page or page type for an experience and include it in a spreadsheet with the following fields: sitemap ID, wireframe ID, content modules (which can be several different levels), copy, metadata, associated images/videos/documents and any other necessary fields.
- As you work through each page type and close on the design, update the matrix to reflect the structure of the page type.
- Fill in any necessary known copy (this may not always be included in a matrix).
- If using for content migration, identify where in the existing solution the content comes from and where it will go in the future state.

Content Matrix (General) Example

Example Name: CONTENT MATRIX-EXAMPLE

Example ID & Version: cmax-dsn-xmpl-01

Phase: DESIGN

Creation Date: MARCH, 2015

INSTRUCTIONS

A Content Matrix captures each piece of content present in a Website design. The captured content should include all include images, data and content modules used within the Website. This Content Matrix will help you catalog and identify each piece of unique content, any rules of use including permutations and character lengths, and references to the appropriate Sitemap and Wireframes. This will assist you in tracing content to its origin and associated rules that dictate its characteristics. A content matrix is a living document; regard it as the definitive source for all content on your Website.

This template provides several different fields, any of which a content audit might capture. You may use it as a reference point and customize it accordingly per the needs of your project. Note: Lipsum Lorem Corp is a fictitious company and the examples provided are intended for representative purposes only.

IPSUM LOREM CORP. - CONTENT MATRIX

ID #	SITEMAP	WIREFRAME	PAGE TITLE	CMS TEMPLATE	MODAL LEVEL 1	MODAL LEVEL 2	MODAL LEVEL 3	FLAVOR/INSTANCE	TRANSLATIONS	FORMAT	ASSET	CHARS	RULES
1.0A.0	1.0A My Shopping Cart	1.0A My Shopping Cart Page - User View	My Shopping Cart	NONEDITORIAL	My Shopping Cart: User Account			Authenticated		HTML			
1.0A.1	1.0A My Shopping Cart	1.0A My Shopping Cart Page - User View	My Shopping Cart	NONEDITORIAL	My Shopping Cart: User Account	User Profile Module		Authenticated		HTML		N/A	Dependency is that the user has placed items into cart; see wireframe annotations.
1.0A.1.1	1.0A My Shopping Cart	1.0A My Shopping Cart Page - User View	My Shopping Cart	NONEDITORIAL	My Shopping Cart: User Account	User Profile Module	Update Profile	Authenticated		HTML		N/A	
1.0A.1.1.2	1.0A My Shopping Cart	1.0A My Shopping Cart Page - User View	My Shopping Cart	NONEDITORIAL		User Profile Module	Billing information	Authenticated		HTML		N/A	
1.0A.1.1.3	1.0A My Shopping Cart	1.0A My Shopping Cart Page - User View	My Shopping Cart	NONEDITORIAL	My Shopping Cart: User Account	User Profile Module	User Account (Login, Password) info	Authenticated		HTML		N/A	
1.0A.1.1.4	1.0A My Shopping Cart	1.0A My Shopping Cart Page - User View	My Shopping Cart	NONEDITORIAL	My Shopping Cart: User Account	User Profile Module	Picture	Authenticated		JPEG/GIF	UserProfilePhoto.JPG	N/A	User Generated Content; Moderated
1.0B.0	1.0B My Shopping Cart Login	1.0B My Shopping Cart Page - Login	My Shopping Cart - Login	NONEDITORIAL	My Shopping Cart: Login Page			Unauthenticated		HTML		N/A	
2.3B.0	About Us - Press - Latest Articles	2.0 About Us - In the Press	About Us - In the Press - Latest Articles	ARTICLE	About Us - Article Summary					HTML		N/A	
2.3B.1	About Us - Press - Latest Articles	2.0 About Us - In the Press	About Us - In the Press - Latest Articles	ARTICLE	About Us - Article Summary	Summary Text			FRENCH	HTML		100	6 summaries per latest news page, each summary captures Article Title and then first 100characters.
2.3B.2	About Us - Press - Latest Articles	2.0 About Us - In the Press	About Us - In the Press - Latest Articles	ARTICLE	About Us - Article Summary	Summary Photo			FRENCH	JPEG		N/A	

Content Development Matrix/Content Creation Schedule

The content development matrix/content creation schedule builds on the content matrix (general) to manage the new content creation process. The difference between the two is that the content development matrix includes the following information: who is creating the content, the schedule for completion and legal reviews, etc.

Create a Content Development Matrix/Content Creation Schedule:

- Create a spreadsheet and gather the following information:
  - List all necessary content required for the experience.
  - Add when the content/document was last edited and who edited it.
  - Ensure you include the content/document expiration and renewal policy.
  - Note the notifications for when expired content needs to be updated (and who is to be alerted).
  - Create fields for the following: identifying content owners, metadata and content gaps, and tracking the content production process.
  - Identify which content requires approval along with anyone who must approve it.

Content Development Matrix/Content Creation Schedule Example

Example Name: CONTENT DEVELOPMENT MATRIX/CONTENT CREATION EXAMPLE

Copyright & Version: cdmx-dsn-xmpl-01

Phase: DESIGN

Completion: MARCH, 2015

CONTENT DEVELOPMENT MATRIX/CONTENT CREATION

Instructions/Notes/Uses	Section	Title	Sitemap ID	Wireframe ID	Template ID	Module Name/Description	Module	Content Type	Interactive Element	Show on Mobile	Dynamic	Video Title	Article Title	Excel Title	Excel Doc Name	PDF Name	PDF File/ URL	Image Description	Image Location (If Copy Link)	File Name
The content development tool is to be used as a guide for the development of the content on enterprise sites. It will be specific to each site. Mapping of the webpages to wireframe templates. Mapping of the webpages to wireframe templates. Mapping of the webpages to page templates. Method/Key: Identify the content elements, metadata, identify ownership and track the content production process.	Investors	Stocks, Stocks & More Stocks	041.1.3.0	5.3	AOW	Stocks	A1.3	PDF	N/A	Y	N	N/A	Stocks, Stocks & More Stocks	N/A	N/A	4Q2015 Financial Statements				
	Investors	Quarterly Earnings (4Q2015) Quarter	041.1.3.0	5.3	AOW	Stocks	A1.3	MS EXCEL	N/A	Y	N	N/A	Non-GAAP Reconciliations	Non-GAAP Reconciliations	2007_q4_rec.xls	N/A	N/A	N/A	N/A	N/A
	Investors	Quarterly Earnings (4Q2015) Quarter	041.1.3.0	5.3	AOW	Stocks	A1.3	MS EXCEL	N/A	Y	N	N/A	Financial Statements	Financial Statements	2007_q4_fs_4.xls	N/A	N/A	N/A	N/A	N/A
	Investors	Quarterly Earnings (4Q2015) Quarter	041.1.3.7	5.4	BTS	Bonds	B1.4	MS EXCEL	N/A	Y	N	N/A	Financial Statements	Financial Statements	N/A	N/A	N/A	N/A	N/A	N/A
	Investors	Quarterly Earnings (4Q2015) Quarter	041.1.3.7	5.4	BTS	Bonds	B1.4	News Feed	N/A	Y	Y	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Existing/New	Edit Y/N	Copy Recommendations and Special Rules	Existing URL (s)	Max Character	Copy Deck Reference	Source	Priority	Author	Keywords	Description	Due Date	Date Information Received	Status Notes	Content Development Completed	Source Content Reviewed	Description of Change	Content Review Complete	Requested Revisions Complete	Legal Review Complete	Date Uploaded to CMS
Existing	Y	double-check numbers	www.abc.com/*	500	Page 5	CMS	High	Leon	stocks, stock exchange	how to invest or trade stocks from stocks	2015-08-10	2015-06-01	with copywriter		Go N. Places					
N/A	N	N/A		N/A	N/A	CMS	Medium	Moon	stocks, stock exchange	Financial Statements	2015-08-10	2015-06-01	with copywriter		Go N. Places	updates charts	1306-07-01	1306-07-06	1306-07-09	1306-07-11
N/A	N	N/A		N/A	N/A	CMS	Medium	Sean	stocks, stock exchange	Financial Statements	2015-10-10	2015-06-01	with copywriter		Go N. Places	updates charts				
N/A	N	N/A		N/A	N/A	CMS	Medium	Leon	stocks, stock exchange	Financial Statements	2015-11-10	2015-06-01	with copywriter		Go N. Places					
N/A	N	N/A		N/A	N/A	newsfeed	Medium	Leon	Unknown	N/A	N/A	TBD	pending		Go N. Places					

Content Logic Rules

By building computer intelligence, or logic, into your content strategy, you can offer personalized or contextually relevant content to your users. Content logic rules are based on taxonomy, business rules and metadata. Your decisions as to what logic to use and when can be informed by personas, user research, user experience assessments and user/customer journeys. Three types of commonly used content logic include: cross-sell, upsell, recommendation logic and personalization strategy.

Cross-sell/Upsell

Cross-sell includes content that surfaces when a user views a particular product with the intent to sell additional items related to the product. For example, a belt to go along with a skirt or matching shoes. Upsell includes content intended to push a consumer to buy a product with a higher purchase point, such as a car model with additional features.

Recommendation logic

Recommendation logic includes content that surfaces when a consumer views an item, directing the consumer to products or services other consumers purchased or viewed additionally. For example, on Amazon when viewing a product, you may see the following message: "Customers who purchased (xx), also bought (xx)."

Personalization strategy

A personalization strategy is an approach for customizing content or experiences based on an understanding of user behavior, needs and expectations. Content can be offered to users based on their previous behavior.

Create Content Logic Rules:

- Clearly define desired customer behavior. Consult the user/experience assessment, user/customer journeys, personas and other pertinent documentation.
- Include metrics for measuring desired customer behavior.
- Document content/logic rules in the content model.

Best Practice ID	Version	Created	Author	Example ID & Link	Pages
clr-dsn-bp	01.	MAR-2015	CSA-BPC	cmod-dsn-xmpl-01	1 of 1

Content Logic Rules Example

Please Note: The content logic rules example is part of the content model example

Display Rules	Business Rules	Editorial Rules	Persona/Target Audience	Personalization Rules	Metadata	Channel Output
			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
		Use descriptive alt text with relevant keywords.	Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
Suppress on mobile.		Use sentence case capitalization.	Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
Suppress on mobile		Use title case capitalization.	Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
		Use keyword-rich headlines, when appropriate. Use title case capitalization.	Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
		Use keyword-rich sub-headlines, when appropriate. Use title case capitalization.	Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
	Does not allow embedding of images or HTML beyond rich text editing capabilities offered within OOTB WYSIWYG editor.		Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
Display only when user state = Anonymous			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
Display only when user state = Anonymous			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
Display only when user state = Authenticated			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
Display only when user state = Authenticated			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
Display only when user state = Authenticated			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
Display only when user state = Authenticated			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
Display only when user state = Authenticated			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web

Content Model (Final)

For this document you will add more detail and finalize the high-level content model you began in the analyzing phase.

Create the Final Content Model:

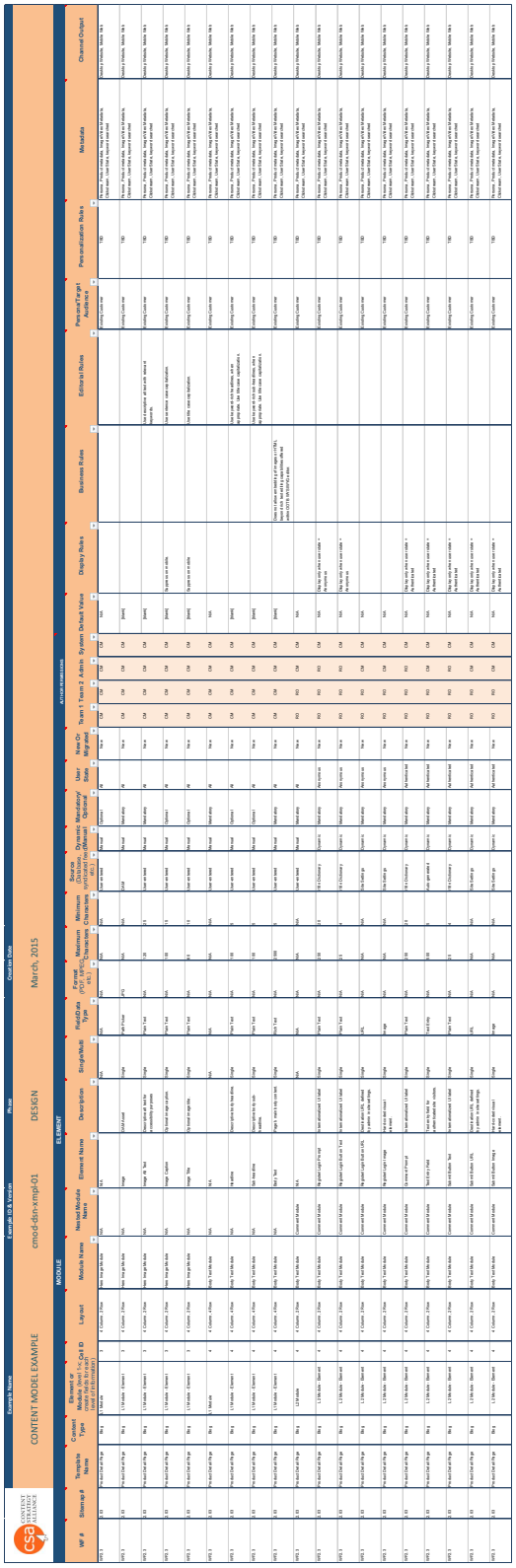
- As the business requirements and design are fleshed out, ensure you capture all necessary information for the content model.
- As wireframes are completed, and the content matrix is closed, continue capturing content types, and document the templates and the modules (within templates) they map to. (Note: one template can apply to many pages within an experience.)
- Work with a business analyst to define the business rules, content rules and logic for each content element. (A business analyst should capture the business requirements in a functional specification. The content strategist will capture the content-specific rules in the content model.)

Reference:

Nichols, Kevin P. *Enterprise Content Strategy: A Project Guide*

Best Practice ID	Version	Created	Author	Example ID & Link	Pages
cmod-dsn-bp	01.	MAR-2015	CSA-BPC	cmod-dsn-xmpl-01	1 of 1

Content Model (Final) Example



Example Name	Example ID & Version	Phase	Creation Date
CONTENT MODEL EXAMPLE	cmod-dsn-xmpl-01	DESIGN	March, 2015

						MODULE			ELEMENT												AUTHOR PERMISSIONS											
WF #	Sitemap #	Template Name	Content Type	Element or Module (level 1-x; Cell ID create fields for each level of information)		Layout	Module Name	Nested Module Name	Element Name	Description	Single/Multi	Field/Data Type	Format (PDF, MPEG etc.)	Maximum Characters	Minimum Characters	Source (Database, syndicated feed etc.)	Dynamic /Manual	Mandatory/ Optional	User State	New Or Migrated	Team 1	Team 2	Admin	System	Default Value	Display Rules	Business Rules	Editorial Rules	Persona/Target Audience	Personalization Rules	Metadata	Channel Output
WF23	2.03	Product Detail Page	Blog	L1 Module	3	4 Column, 2 Row	Hero Image Module	N/A	N/A		N/A	N/A	N/A	N/A	N/A	User-entered	Manual	Optional	All	New	CM	CM	CM	CM	N/A				Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF23	2.03	Product Detail Page	Blog	L1 Module - Element	3	4 Column, 2 Row	Hero Image Module	N/A	Image	DAM Asset	Single	Path Picker	JPG	N/A	N/A	DAM	Manual	Mandatory	All	New	CM	CM	CM	CM	[blank]				Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF23	2.03	Product Detail Page	Blog	L1 Module - Element	3	4 Column, 2 Row	Hero Image Module	N/A	Image Alt Text	Descriptive alt text for accessibility purposes	Single	Plain Text	N/A	120	25	User-entered	Manual	Mandatory	All	New	CM	CM	CM	CM	[blank]			Use descriptive alt text with relevant keywords.	Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF23	2.03	Product Detail Page	Blog	L1 Module - Element	3	4 Column, 2 Row	Hero Image Module	N/A	Image Caption	Optional image caption.	Single	Plain Text	N/A	100	15	User-entered	Manual	Optional	All	New	CM	CM	CM	CM	[blank]	Suppress on mobile.		Use sentence case capitalization.	Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF23	2.03	Product Detail Page	Blog	L1 Module - Element	3	4 Column, 2 Row	Hero Image Module	N/A	Image Title	Optional image title.	Single	Plain Text	N/A	60	10	User-entered	Manual	Optional	All	New	CM	CM	CM	CM	[blank]	Suppress on mobile		Use title case capitalization.	Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF23	2.03	Product Detail Page	Blog	L1 Module	4	4 Column, 4 Row	Body Text Module	N/A	N/A		N/A	N/A	N/A	N/A	N/A	User-entered	Manual	Mandatory	All	New	CM	CM	CM	CM	N/A				Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF23	2.03	Product Detail Page	Blog	L1 Module - Element	4	4 Column, 4 Row	Body Text Module	N/A	Headline	Descriptive body headline.	Single	Plain Text	N/A	100	5	User-entered	Manual	Optional	All	New	CM	CM	CM	CM	[blank]			Use keyword-rich headlines, when appropriate. Use title case capitalization.	Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF23	2.03	Product Detail Page	Blog	L1 Module - Element	4	4 Column, 4 Row	Body Text Module	N/A	Sub-headline	Descriptive body sub-headline.	Single	Plain Text	N/A	100	5	User-entered	Manual	Optional	All	New	CM	CM	CM	CM	[blank]			Use keyword-rich sub-headlines, when appropriate. Use title case capitalization.	Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF23	2.03	Product Detail Page	Blog	L1 Module - Element	4	4 Column, 4 Row	Body Text Module	N/A	Body Text	Page's main body content.	Single	Rich Text	N/A	2500	5	User-entered	Manual	Mandatory	All	New	CM	CM	CM	CM	[blank]		Does not allow embedding of images or HTML beyond rich text editing capabilities offered within OOTB WYSIWYG editor.		Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF23	2.03	Product Detail Page	Blog	L2 Module	4	4 Column, 2 Row	Body Text Module	Comment Module	N/A		N/A	N/A	N/A	N/A	N/A	User-entered	Manual	Mandatory	All	New	RO	RO	CM	CM	N/A				Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF23	2.03	Product Detail Page	Blog	L2 Module - Element	4	4 Column, 2 Row	Body Text Module	Comment Module	Register/Login Prompt	Internationalized UI label	Single	Plain Text	N/A	250	20	i18n Dictionary	Dynamic	Mandatory	Anonymous	New	RO	RO	RO	CM	N/A	Display only when user state = Anonymous			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF23	2.03	Product Detail Page	Blog	L2 Module - Element	4	4 Column, 2 Row	Body Text Module	Comment Module	Register/Login Button Text	Internationalized UI label	Single	Plain Text	N/A	25	4	i18n Dictionary	Dynamic	Mandatory	Anonymous	New	RO	RO	RO	CM	N/A	Display only when user state = Anonymous			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF23	2.03	Product Detail Page	Blog	L2 Module - Element	4	4 Column, 2 Row	Body Text Module	Comment Module	Register/Login Button URL	Destination URL defined by admin in site settings.	Single	URL	N/A	N/A	N/A	Site Settings	Dynamic	Mandatory	Anonymous	New	RO	RO	CM	CM	N/A				Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF23	2.03	Product Detail Page	Blog	L2 Module - Element	4	4 Column, 2 Row	Body Text Module	Comment Module	Register/Login Image	Hard-coded visual element.	Single	Image	N/A	N/A	N/A	Site Settings	Dynamic	Mandatory	Anonymous	New	RO	RO	CM	CM	N/A				Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF23	2.03	Product Detail Page	Blog	L2 Module - Element	4	4 Column, 2 Row	Body Text Module	Comment Module	Comment Prompt	Internationalized UI label	Single	Plain Text	N/A	250	20	i18n Dictionary	Dynamic	Mandatory	Authenticated	New	RO	RO	RO	CM	N/A	Display only when user state = Authenticated			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF23	2.03	Product Detail Page	Blog	L2 Module - Element	4	4 Column, 2 Row	Body Text Module	Comment Module	Text Entry Field	Text entry field for authenticated site visitors.	Single	Text Entry	N/A	500	5	Auto-generated	Dynamic	Mandatory	Authenticated	New	RO	RO	CM	CM	N/A	Display only when user state = Authenticated			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF23	2.03	Product Detail Page	Blog	L2 Module - Element	4	4 Column, 2 Row	Body Text Module	Comment Module	Submit Button Text	Internationalized UI label	Single	Plain Text	N/A	25	4	i18n Dictionary	Dynamic	Mandatory	Authenticated	New	RO	RO	RO	CM	N/A	Display only when user state = Authenticated			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF23	2.03	Product Detail Page	Blog	L2 Module - Element	4	4 Column, 2 Row	Body Text Module	Comment Module	Submit Button URL	Destination URL defined by admin in site settings.	Single	URL	N/A	N/A	N/A	Site Settings	Dynamic	Mandatory	Authenticated	New	RO	RO	CM	CM	N/A	Display only when user state = Authenticated			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web
WF23	2.03	Product Detail Page	Blog	L2 Module - Element	4	4 Column, 2 Row	Body Text Module	Comment Module	Submit Button Image	Hard-coded visual element.	Single	Image	N/A	N/A	N/A	Site Settings	Dynamic	Mandatory	Authenticated	New	RO	RO	CM	CM	N/A	Display only when user state = Authenticated			Existing Customer	TBD	Persona, Product metadata, Image/Video Metadata, Clickstream, User State, keyword searched	Desktop Website, Mobile Web

SEO Recommendations

Search engine optimization (SEO) recommendations offer techniques and approaches for authoring and tagging content to ensure it performs well in search results. These guidelines should be supplied to content authors and editors so they understand the terminology and the types of content necessary to support SEO. Also, SEO recommendations can supply authors with techniques for authoring SEO-critical content elements such as URLs, links, metadata and page headings.

Create SEO Recommendations:

- Look at the goals and objectives of the experience and individual pages.
- Decide which pages to optimize based on the importance of supporting business and user goals. For example, you will want to optimize pages that are critical to selling your products and services, such as landing pages and product detail pages.
- Define metadata/keywords for each page or document.
- Look at ways to optimize the experience such as URL strategy, use of keywords in content, link authoring and metadata.
- Ensure that copywriters have a guide to write for SEO.
- Make sure the site or experience is evaluated frequently for SEO performance.

Reference:

8 Free and Simple Methods For Finding New Keywords and Topics
Keywords Research: A Guide For the Rest of Us
The Beginner's Guide to SEO: Keyword Research
Clay, Bruce & Esparza, Susan. *Search Engine Optimization: All in One for Dummies*
Rosenfeld, Lou. *Search Analytics For Your Site*

SEO Recommendations Example

CONTENT STRATEGY ALLIANCE

Example Name: SEO RECOMMENDATIONS EXAMPLE

Example ID & Version: seor-dsn-xmpl-01

Phase: DESIGN

Created on/Date: MARCH, 2015

PAGE URL	HTML TITLE	META DESCRIPTION	INTERNAL ISSUES	ORGANIC ENTRIES, VISITS, CONVERSIONS	SEARCH STRING USED ON SITE	POINT OF ENTRY	INBOUND LINKS	REFERRAL SITES (including social media)	DEVICE USED	KEYWORD PERFORMANCE EXAMPLES	PRIMARY KEYWORDS	SECONDARY KEYWORD	TARGET AUDIENCE	PAGE FUNCTION	IMAGE FILE NAME	ALTERNATE TEXT
www.company.com/co-location	Co-location Services	View information on services provided by company XXXXX. Link to company XXXXX.	www.co-location.com	Facebook Conversion: 188 Twitter Conversion: 98 Organic Entry: co-location services; 20% conversion	Co-location services	Facebook/twitter/company/co-location landing page	Co-location landing page	www.co-location.com	Computer	Co-location: 3 Latency: 2	co-location	latency	Co-customer manager and administrators	Provide information on service Co-location facility and its benefits to co-location space	Co-location.jpg	Co-location Facility
www.company.com/co-location	Co-location Services	View information on Company XXXXX's services and link back connection to company XXXXX.	www.co-location.com	Facebook Conversion: 188 Twitter Conversion: 98 Organic Entry: co-location services; 20% conversion	Co-location services	Facebook/twitter/company/co-location landing page	Co-location landing page	www.co-location.com	Smartphone	Co-location: 2 Latency: 2	co-location	latency	Co-customer manager and administrators	Provide information on service Co-location facility and its benefits to co-location space	Co-location.jpg	Co-location Facility

Content Life Cycle and Workflow

Sometimes confusion arises over the difference between content workflows and content life cycles.

A **content workflow** routes a document for review or approval. It is part of the content life cycle.

The **content life cycle** is a defined process that is used to manage the different stages (or status) by which content has progressed.

(**Note:** Refer to Appendix 1E for more information on life cycles and their use with a component content management system aka CCMS.)

There are six distinct stages in content life cycles that show the end-to-end processes: plan, create, review and approve, assemble, publish and distribute, and archive.

Create Content Life Cycles:

Plan

The purpose of the planning phase is to define what content needs to be authored, which existing content can be reused, how it will all be assembled, and what the end result will look like once it has been published and distributed.

Begin with a kickoff meeting

- Establish how the end result will look.
- Verify the processes that will be used to create content.
- Determine what content needs to be created and who creates, reviews, approves and ultimately uses it.
- Determine the electronic publishing and distribution process.
- Identify devices that will support the output.

Establish the content hierarchy

- This is the process of determining how your content will be ordered and categorized within a pre-defined assembly structure.
- Determine if an existing hierarchy can be used, or if a new hierarchy needs to be created.

Content Life Cycle and Workflow

- Determine if there are any components within the hierarchy that reference reusable content.
- Assign the different components to each author.
- Identify templates needed for individual components that are to be authored.
- Establish/communicate authoring standards.

Create

Content is typically created using authoring tools that support the development of new content in a structured and consistent fashion, and also provides a clear separation of the information layer from the presentation layer. Additionally, existing content should be referenced as much as possible, so that the same information is not copied and pasted into different content sources.

Define what information needs to be authored

- Are there existing content sub-components that can be reused as-is within a primary component (as a reference)?
- Will other components be cross-referenced?
- Will the content include links to external sources?
- What existing content can be used as a starting point, and updated to create new content?
- What new content will need to be created?
- Will metadata be used to populate variables in the template?
- Will the content include search terms?

Review & Approve (Editorial Workflow)

Once the content has been authored, an editorial workflow is typically used in order to provide a systematic way to facilitate review and approval. An editorial workflow is a representation of a business process in which the tasks associated with content assets follow a specific, pre-defined route from user to user.

A serial workflow occurs when each task is processed by one user at a time, and the user must complete the task before it progresses to the next user.

A parallel workflow occurs when multiple tasks within the workflow can be processed at the same time.

Content Life Cycle and Workflow

Some content management systems (especially document management) support creating PDF renditions of authored content, which can then be used to apply annotations (during the review cycle) or, in certain cases, an electronic signature page (during the approval cycle).

Define who needs to check what was created, and also who must approve it

- Reviewers check content and provide feedback to the author.
- Approvers sign off on the content so that the content moves from the "draft" state to an "approved" state.
- Approved content components should display to the approver in its final form during the approval workflow.

Assemble

This step consists of relating individual content components together as preparation for creating the published output. When the authoring system leverages version control, advanced publishing systems will provide the ability to create rules whereby a specific node in the structure either references a specific version of a content component, or always the most current version

Combine all of the different components that need to be linked together.

- Assign approved components to the content hierarchy. Determine if this will be manual or can be automated.
- Reconfigure the content hierarchy as needed to meet the final output requirements.
- Perform incremental pre-publishing as needed. Be sure to test all combinations when there is a need to render the content into multiple output formats and to multiple languages all from the same source.

Publish and Distribute

Electronic publishing is the process of rendering the assembly and all of the content components that it references into its final form. Electronically published output can be rendered to different structures (e.g., summary versus detail), can be consumed by different devices (e.g., web and/or mobile) and in some cases can be generated in different languages (e.g., when content is authored in XML).

Content Life Cycle and Workflow

Generate the final output that will be consumed by the end user.

- Conduct a Quality Control (QC) of the final output within the different combinations of supported devices and browsers.
- Identify and correct any issues before content is available for consumption by end users.

Archive

Archiving electronic assets is a process of ensuring that content which is no longer actively used can still be accessed and viewed over time.

Determine if the content needs to be preserved for long-term storage. There are typically two different options available:

- Virtual archive — electronically lock the content so that it can no longer be altered in the originating system
- Physical archive — move the content to different media. Need to perform a checksum verification to ensure that the content has been properly moved from primary media to the archive.

Reference:

Boiko, Bob. *Content Management Bible*

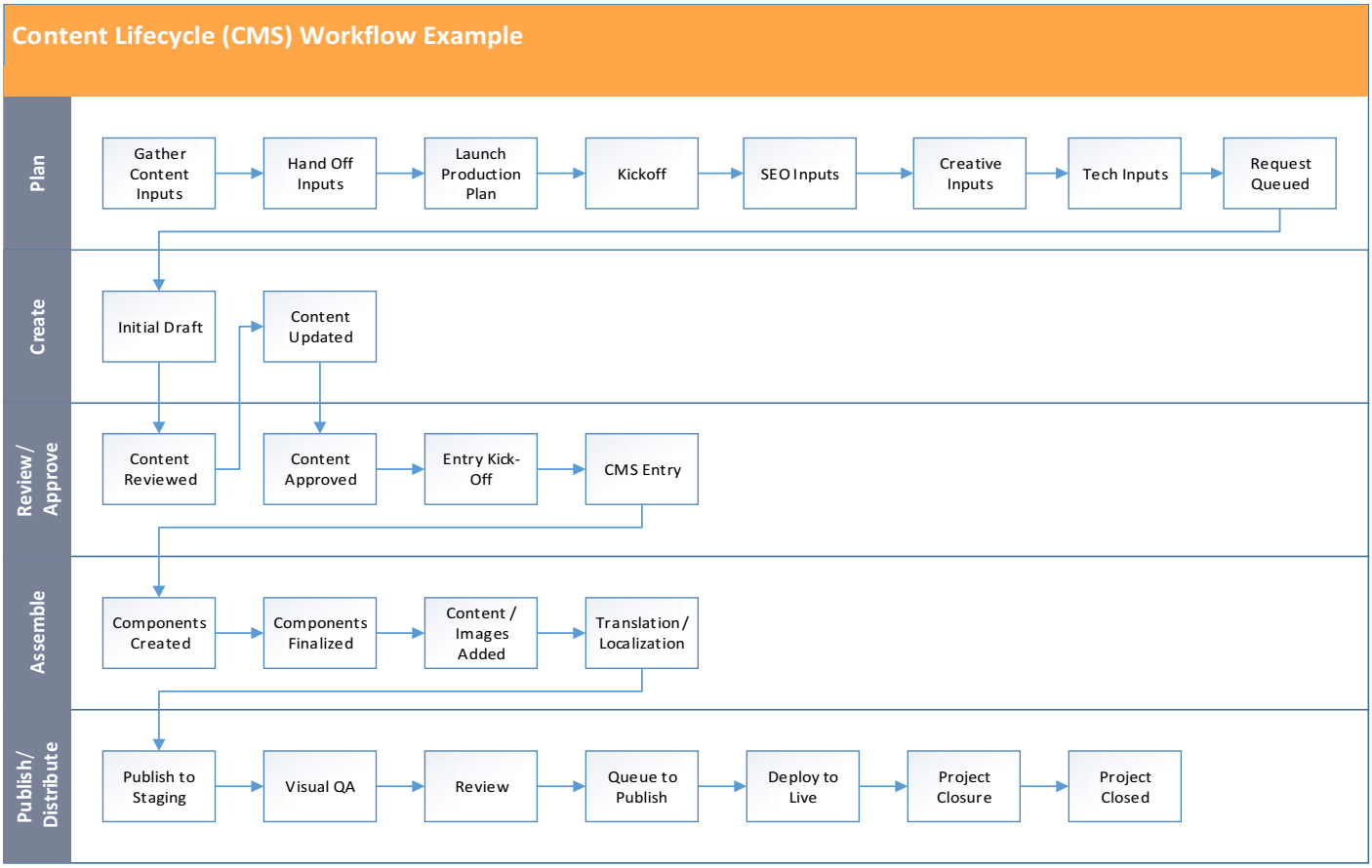
McGovern, Gerry. *Content Critical*

Hackos, Joann. *Content Management for Dynamic Web Delivery*

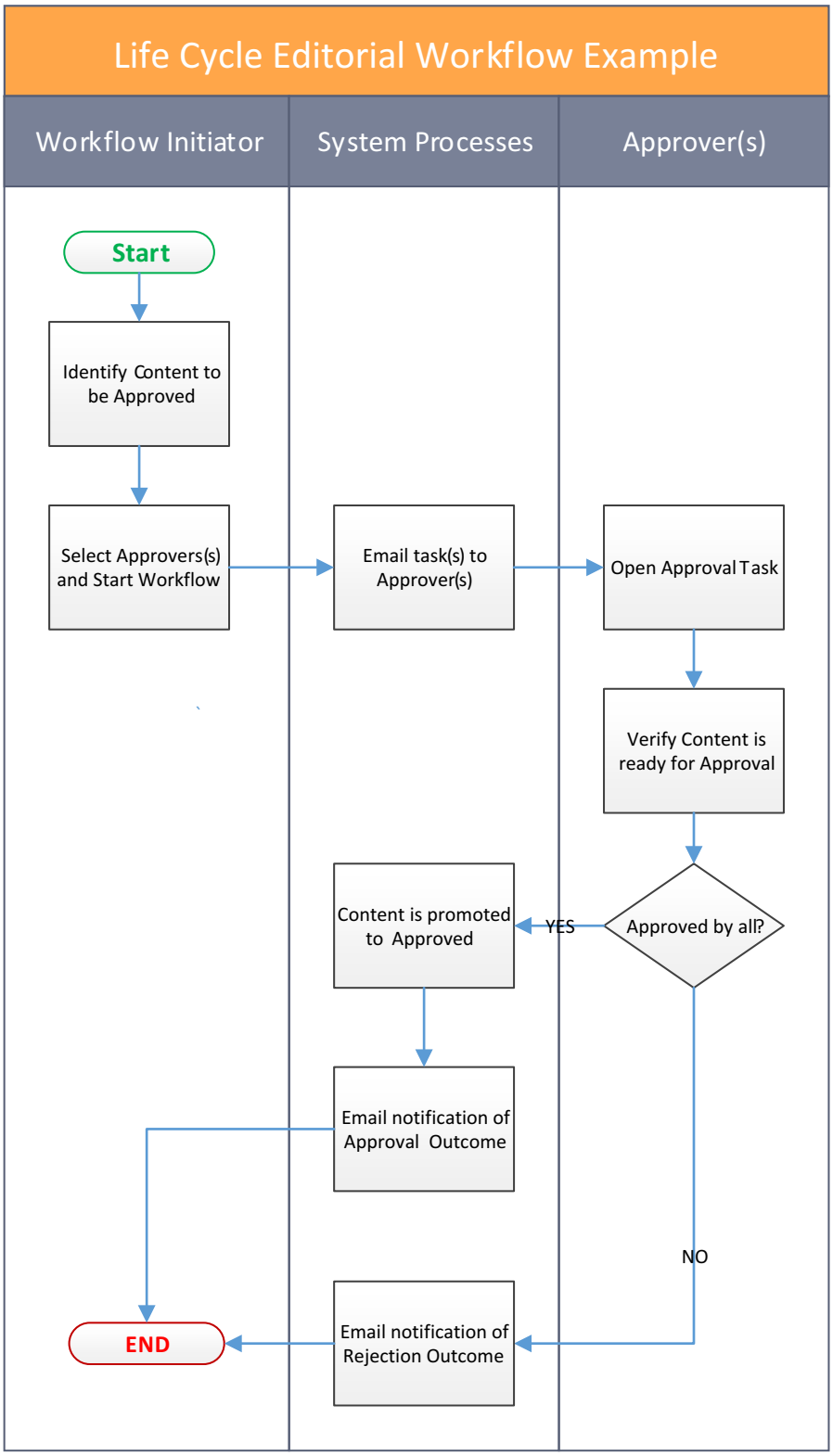
Rockley, Ann. *Managing Enterprise Content*

The CMS Report. CMS Report

Content Life Cycle and Workflow Example 1



Content Life Cycle (Editorial Workflow) Example 2.



Best Practice ID	Version	Created	Author	Template ID & Link	Pages
ccal-dsn-BP	01.	MAR-2015	CSA-BPC	ccal-dsn-tmpl-01 ccsm-dsn-tmpl-01	1 of 1

Content/Editorial Calendar

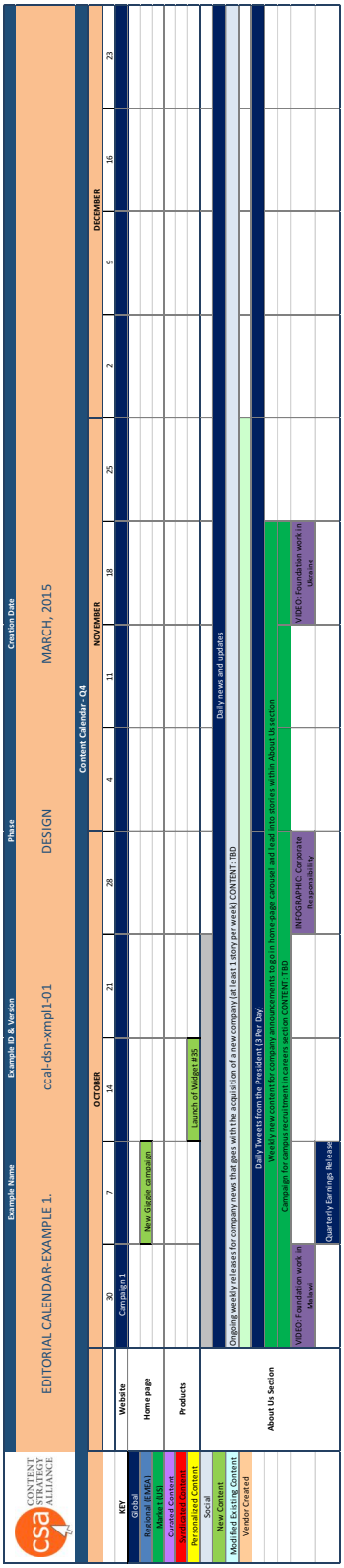
The content/editorial calendar captures which content is scheduled and prioritized for an organization, generally with an annual, quarterly, monthly and sometimes weekly view. A spreadsheet often works best for the format.

Marketing departments and content creators use content calendars to help identify, prioritize and plan for new- and future-content creation. This tool provides great value with content governance and performance-driven content approaches because it helps teams plan for and visualize future-content opportunities.

Create a Content/Editorial Calendar:

- Set up a calendar committee that will meet regularly.
- Get input on needed content and upcoming deadlines and events from as many departments as you can: product, editorial, business, strategy, brand, etc.
- Start with an annual calendar divided into quarters for all content that needs to be created and published. If you are dealing with a lot of content, you may need monthly and weekly views as well.
- An enterprise calendar may be divided into smaller calendars that roll up into a central one.
- Ensure all channels are included.
- You may need separate calendars for important focus areas, such as social media.
- Meet regularly to review the calendar against what you have learned about the content from analytics, SEO, social listening, site metrics, user feedback, new business needs, industry trends and new technology. Use this information to make future-content decisions.
- Continually update the calendar as part of your governance approach.
- Make sure there is someone who “owns” the calendar and its updating.

Content/Editorial Calendar Example 1.



Content/Editorial Calendar (Social Media) Example 2.

CONTENT STRATEGY ALLIANCE

Example Name	Example ID & Version	Phase	Creation Date
SOCIAL MEDIA CALENDAR - EXAMPLE 2.	ccsm-dsn-xmpl2-01	DESIGN	MARCH, 2015

FACEBOOK

Freedom Day

Week	Day	Date		Type	Topic	Notes	Post	Asset	Destination URL	Tagged URL	Shortened URL	Posts This Month	20
Week 0	Sat	1-Feb	AM		Freedom Day							10% Corporate Communications	2
	Sun	2-Feb	Mid		Super Bowl Sunday/ Groundhog Day							10% Affiliate	2
week 1	Mon	3-Feb	PM	Campaign	World Cancer Day				http://www.			20% IndustryX Solutions	4
	Mon	3-Feb		Lifestyle	Black History Month	February is Black History Month.		Collage of famous Black Americans					
	Tues	4-Feb		IndustryX Solutions	Resolutions update: how do you improve yourself?		You made your New Year's resolutions a month ago. What are you doing to stick to them? Share your stories with us.	IDEAS: 1) Calendar of February with today's date highlighted with image of person in today's date box 2) Sign pointing up for 2014; sign pointing down for 2013 3) notepad sheet with "List of resolutions" as the title - 1 through 5 listed with resolutions from our survey last month - Save more for retirement - Pay down credit card debt - Become debt free - Be more charitable				50% Campaign	6
		4-Feb		Geotargeted	South Florida								
		4-Feb		Geotargeted	Kentucky/Louisville/Lexington								
	Wed	5-Feb		Affiliate or Corp Comm or Promo	Getting into shape		Having your first week of working out is not fun. It can be painful and very difficult. Let us help guide you through the process and provide you with the emotional support you need!	Photo of someone receiving a hug at the squat station in a gym.	http://www.			10% Lifestyle/Curiosity	6
	Thurs	6-Feb		Campaign	#hashtag								20
	Fri	7-Feb		Lifestyle	Winter Olympics - http://www.sochi2014.com/en/	Should be inspirational/aspirational/ motivating		Scene of winter sports or snow scene	http://www.				
	Sat	8-Feb											
	Sun	9-Feb											
week 2	Mon	10-Feb		Campaign	#hashtag								
	Tues	11-Feb		IndustryX Solutions	Internet IndustryX								
	Wed	12-Feb		Affiliate or Corp Comm or Promo	Company first: first charitable foundation by a financial institution in the U.S.		Company first: we established the first charitable foundation by a financial institution in the U.S. Learn more about how we invest time, resources and people to build a better future for the communities we serve. Www.catsmeowcat.com	Lifestyle photo of people in "community" setting	http://www.				
				Geotargeted	1: St. Louis								
				Geotargeted	2: Kentucky/Louisville/Lexington								
	Thurs	13-Feb		Campaign	#hashtag								
	Fri	14-Feb		Lifestyle	Valentine's Day			Hearts, arrows, cupid					
	Sat	15-Feb											
	Sun	16-Feb											
week 3	Mon	17-Feb		Campaign	President's Day			Mount Rushmore pix Some thoughts: www.catsmeowcats.com					
	Tues	18-Feb		IndustryX Solutions	Online Bill Pay								
					1: St Louis								
					2: National Mortgage Conference - Orlando								
	Wed	19-Feb		Affiliate or Corp Comm or Promo	Sponsorships in communities		Together we can do more Through our sponsorship of helping everyone make it to the gym, we strive to better the lives of the people in the communities we serve. Learn more about what we are doing at your gym! Www.catsmeowcats.com	Collage of various sponsorships at gyms					
	Thurs	20-Feb		Campaign	#hashtag								
				Geotargeted	1: St Louis								
				Geotargeted	2: National Mortgage Conference - Orlando								
	Fri	21-Feb		Lifestyle	Daytona 500 and Car			Race car - can we use company car?					
	Sat	22-Feb											
	Sun	23-Feb			Daytona 500								
week 4	Mon	24-Feb		Campaign	#hashtag								
	Tues	25-Feb		IndustryX Solutions	Mobile App								
				Geotargeted	1: Nashville								
	Wed	26-Feb		Affiliate or Corp Comm or Promo	"If you have knowledge, let others light their candles in it." — Margaret Fuller, American Journalist and womenś rights advocate (died 1850)	(died 1850)	"If you have knowledge, let others light their candles in it." — Margaret Fuller, American Journalist and womenś rights advocate	Picture of candle or Margaret Fuller					
	Thurs	27-Feb		Campaign	#hashtag - Contribution Update (Thank you and/or still time to participate)								
	Fri	28-Feb		Lifestyle Option #1	National Tooth Fairy Day- the price of a tooth is going up article	Date of article is 8/30/2013		Image of tooth fairy - maybe some dollars thrown in	http://www.				
				Lifestyle Option #2	Eleanor Roosevelt quote		"Life was meant to be lived, and curiosity must be kept alive. One must never, for whatever reason, turn his back on life." - Eleanor Roosevelt, American First Lady, Diplomat	Pix of Eleanor Roosevelt? Image of people "living to the fullest" - happy, smiling doing something fun - sailing? Running on beach?					

Localization and Translation Plans

Localization and translation plans capture the plan, people, processes and tools necessary to support content localization and translation.

Localization strategy is the process of tailoring content for the localities where your audiences live, using translated content, locale-specific channels (e.g., Weibo), and other tools. The translation plan identifies which content will be translated, which languages will be targeted, if human or machine-assisted methods will be used and the schedule for translation.

Create a Localization and Translation Plan:

- Document in the content audit which content will be translated and into which languages.
- Make sure all words, phrases, symbols, icons, maps, flags and gestures used are culturally appropriate for all countries in which your content appears.
- Identify the languages required for translation.
- Decide who is translating it and how.
- Identify regional distribution channels.
- Establish and maintain guidance for clear region-specific voice and tone; share the guidance with authors and translation vendors.

Reference:

Swisher, Val. *Global Content Strategy: A Primer*

Localization and Translation Plans Example

Example Name	Template & Version	Phase	Creation Date
LOCALIZATION/TRANSLATION-EXAMPLE	ltp-dsn-xmpl-01	DESIGN	MARCH, 2015

Asset Name	Region/Locale	Priority	Locale-specific legal needed?	Translation Needed	Translation Method	Native speakers available as translators?	Local Subject Matter Expert	Translation Cost	Local version go live simultaneous w/ English version?	Time zone localization needed	# of images or text that require localization	Screenshots to be captured for locale	# of images to be localized for cultural sensitivity
Home Page Copy	Mexico	High	Yes	Yes	Manual -2000 words/day	Yes	Sandy Beach	.15/word	Yes	Yes	35	35	15

Metadata Strategy

Metadata is a list of terms for "data about data." A metadata strategy uses identifying words, images, terms and other markers to classify data (tagging) to make it easier to retrieve, use or manage information.

Create Metadata:

- Review any metadata schema (a logical plan showing the relationship between metadata elements), XML schemas and data models that are already being used.
- Pick a standard that is agreed upon by the technology team. Dublin Core is highly regarded.
- Determine which tags are system-generated and which are user-generated.
- Define metadata for every template based on content types, personalization, cross-sell, upsell, user authentication and semantic content.
- Be sure all inheritance schemes and models are accounted for.
- Define parent-to-child relationships and any other associated relationships.
- Include search engine optimization (SEO) for websites and portals.
- Create a spreadsheet to document where and when to place metadata.
- If there is a metadata specialist on the team, he or she can help determine the required metadata.
- Document metadata elements and create a how-to-use-metadata guide.

Adapted from Kevin P. Nichols' *Enterprise Content Strategy: A Project Guide*

Best Practice ID	Version	Created	Author	Example ID & Link	Pages
mds-dsn-bp	01.	MAR-2015	CSA-BPC	mds-dsn-xmpl-01	1 of 1

Metadata Strategy Example

Note: This is a multi-page document. To view the entire example, you will need to click on the Example ID & Link above or refer to the “How to use this book” page for further downloading and viewing options.

Performance Metrics

Performance metrics are key content progress indicators or metrics (such as conversion metrics, exit rates, bounce rates, downloads, views, shares, etc.) that measure the performance of content. With this data, the organization can make informed decisions for future-content planning and restructure content that isn't effective.

Create a Performance Metrics Document:

- Use the metrics chart on the performance metrics table (next page) to evaluate your content.
- To consider your metrics in context, you might want to compare your data to applicable data from your industry, competitors and vendors.

Performance Metrics Table

Metric	Definition
Site traffic	How many users visit a website or experience?
Traffic sources	The sources of traffic to a website or experience: direct, organic or referral.
Referring sites	Websites that send traffic directly to your site (not search engines)
External keyword search terms	Which terms are used in search, both within your website and through organic search.
Onsite Search Keywords	Which terms are used in search within your website?
Unique visitors	The number of individuals who visit a site during a specific period of time. This does not count repeat visits by the same individual.
New versus returning visitors	Unique visitors versus visitors who came back more than once.
User -interaction history	How often a consumer visits.
Point of entry	How a consumer enters the website, for example, through a banner ad or search engine.
Pages per visit	The number of web pages visited during a session on average.
User/consumer path & click stream	The path a user takes to complete a task.
Length of visit	The amount of time spent on the website during a session on average.
Depth of visit	How far a consumer goes into the website.
Conversion rate	The percentage of users who take a desired action, for example, buy something on a site.
Number of visits to convert	The number of times a consumer leaves and returns before converting.
Value of interaction	The total revenue generated from the visit.
Cost to convert	How much a conversion costs an organization, considering internal spending, total conversions and if applicable , revenue of conversions.
Most viewed pages	The pages with the highest number of views on the content experience or website.
Least viewed pages	The pages with the lowest number of views on the content experience or website.
Exit Rate	The percentage of all page views to a page that were the last in the session.
Average visit duration	The amount of time spent on the content experience, such as a website, during a session on average.
Bounce rate	Bounce rate is the percentage for all sessions that start with a page that was the only one of the session.
Downloads	The number of times users copy a piece of content to their own computer/device.
Views	The number of times a piece of content has been viewed .
Shares	The number of times a piece of content has been shared via email or a social media network.
Device used	The device the user is on when viewing the information (e.g., desktop computer, smartphone, tablet) .
Post rates	Which content is shared by whom and when; includes when a consumer re -shares the content (e.g ., retweeting) .
Share of voice	How frequently social media mentions your website, brand, or organization .
Referrals from social media	Which social media refers visitors to your website?
Social sentiment	What others are writing about you in social media .
Repeat engagement	Which consumers, and how many, continue to mention your content, for example, repeat shares of content on Facebook .

Resource:
Kaushik, Avinash. *Web Analytics 2.0: The Art of Online Accountability & Science of Customer Centricity*
Books/Workshops by Web Analytics Demystified

Best Practice ID	Version	Created	Author	Example ID & Link	Pages
pmet-dsn-bp	01.	MAR-2015	CSA-BPC	pmet-dsn-xmpl-01	1 of 1

Performance Metrics Example

Example Name	Example ID & Version	Phase	Creation Date
PERFORMANCE METRICS-EXAMPLE	pmet-dsn-xmpl-01	DESIGN	MARCH, 2015

Note: All of these metrics may not apply to the digital experience you want to measure, or there may be other ones to add to those listed. You will need to determine which metrics make the most sense for your goals.

Page	Site Traffic	Traffic Sources	Referring Sites	External Keyword Search Terms	Onsite Search Keywords	Unique Visitors	New versus Returning Visitors	User-interaction History	Point of Entry	Pages per Visit	User/Consumer Path & Click Stream	Length of Visit	Depth of Visit	Conversion Rate
Talking Robots Inc. Website														
Home	100K	www.robotsrus.com	www.welovereobots.com	robots, toys	Robots	50K	25K	2x month	Google, Robots Q4 email	7	Home-Products-Cart	7 minutes	3 levels	5%

											Social Media Specific				
Number of Visits to Convert	Value of Interaction	Cost to Convert	Most Viewed Pages	Least Viewed Pages	Exit Rate	Bounce Rate	Downloads	Views	Shares	Device Used	Post Rates	Share of Voice	Referrals from Social Media	Social Sentiment	Repeat Engagement
3	$15	$3	Rotating Robots Product Page	Cat Robots Product Page	30%	35%	3	3	10	Smartphone	10%	3%	Facebook, Twitter, Pinterest	Love the Mad Men Robots	Mad Men fans - average of 8 mentions

Content Creation Guide

The content creation guide (CCG) is a document designed mainly to aid and guide the copywriter. Its purpose is to define for the copywriter what specific information should appear in each section on a web page or experience. The CCG lists out individual parts of the page or experience (hero area, main body copy, callouts/promos, etc.) and defines the content for those areas. It may provide sample text and also content research sources (URLs, articles, marketing collateral, etc.).

Similar to a content brief, the CCG may also include information on tone, voice, audience, brand, user research and analytics. It can also provide guidance on SEO elements, technical specifications, content maintenance issues, error messages, messaging statements, key phrases, word count and SEO keywords. (Note: See Appendix G for more information on Error Messages.)

(Note: The CCG may contain information also found in the page-level strategic intent document. Depending on the project, these two documents could be combined.)

Create a Content Creation Guide:

- Create a word document (or spreadsheet if you prefer) with the following headers (add any others specific to your project):
  - Authored by
  - Last updated
  - Document description
  - Page description/goal of the page
  - Audience
  - Primary message
  - Key phrases
  - Page subhead region
  - Content area (as many as you need)
  - Subfooter
  - Footer
  - Keywords
  - Source content
  - Word count
  - Sample copy

Content Creation Guide Example

	Example Name	ID & Version	Phase	Creation Date
CONTENT STRATEGY ALLIANCE	Content Creation Guide	ccg-dsn-xmpl-01	Design	March 2015

Description /Goal of Page	Best-of-breed, industry-leading solutions targeting large hospital chains, independent hotels, motels, and bed-and-breakfasts Entertainment and communication solutions that improve your guests'experience. Connectivity is very important, too.
Audience	Owners of small to medium hotels, motels and bed and breakfasts; hotel associations; and large hotel corporations.
Primary Message	We are THE force to be reckoned with in this space! This is our core competency because of our history as a company with sole control in the WiFi space.
Key Phrases	In-room technology services, guest experience, home away from home, WiFi, Fast internet
Page Subhead Region	Page Title: Hospitality Headline: (TBD) Copy: (2 lines) Main Contact Utility Copy: (TBD)
Content Area	Headline: The Best in Hospitality Copy (up to two paragraphs) Need more information? [Box] Coverage Map: Check for availability in your area
Content Area/Product Snapshot	Headline: Products for the Hospitable Header: Voice Copy: (TBD) CTA: (TBD) Button: Solutions for Every Businesses Header: WiFi Header: Network Services Header: Cloud Services Header: TV

Content Creation Guide Example

Content Area/Product Snapshot	Image: Voice equipment Header: Business Class WiFi Copy: (up to 3 lines) Button: Contact to Order Link: Learn More Dynamic Content: Upcoming Events & Featured Resources
Content Area	Headline: Best In-Room Entertainment Copy: (up to 2 paragraphs) CTA: (TBD) Headline: Most Reliable Connectivity Copy: (2 lines) Headline: Simple Account Management and Billing Copy: (2 lines) Headline: Clear Connections and Cost Savings Copy: (2 lines) Headline: Connect Properties and Headquarters Copy: (2 lines)
Subfooter & Footer	Benefits of Working with Frank's Guest Mobility A large, international footprint Hire us to create your best experiences
Keywords	hospitality technology Wifi connectivity, always-on
Source Content	Pitch Deck: https://com/ Hospitality Key Sales Points: https://com/ Wifi for Hospitality: https://com/ Channel Lineup https://com/ https://com/
Word Count	500 words
Sample Copy	Frank's Guest Mobility offers expertise in Wifi and cable connectivity for hotels and motels. We can quickly enable WiFi in your guest rooms, conference rooms and lobbies!

MAINTAIN

Maintaining Phase

Rinse & Repeat. This is an ongoing phase where you will monitor and control your content. You should continue to evaluate its effectiveness and performance annually, quarterly, monthly or even weekly, making decisions on how to seed and feed your content for continual success.

In the maintain phase, you might leverage any or all of the information and templates found within this handbook.

Thus, the focus becomes the evolution of the content experience and content ecosystem. Governing, seeding and evolving your content are the primary drivers of this effort. Ultimately, your goal should be delivering the best content that reflects the evolution of your business goals and objectives and those of your users.

APPENDIX 1

Appendix 1.

We would have loved to go further into many of the above topics, but we had to draw the line somewhere. However, we did want to create this appendix of additional information so you can delve further into some of these topics if you wish.

Appendix 1A. Project Charter

In project management, a project charter, project definition, or project statement is a statement of the scope, objectives and participants in a project. It provides a preliminary delineation of roles and responsibilities, outlines the project objectives, identifies the main stakeholders and defines the authority of the project manager. It serves as a reference of authority for the future of the project. The terms of reference are usually part of the project charter.

- Wikipedia

This is a comprehensive strategic statement describing the work to be performed, who performs it, who can give approvals, who has what responsibilities and how business and user needs will be met. The culture and organizational structure must be defined and taken into account. This charter may provide information on just the content portion of the project, or it can apply to the whole project.

Create a Project Charter:

- Identify the main stakeholders, sponsors and team members. You might want to utilize a stakeholder register (Appendix B).
- Consult with the team and stakeholders to clarify goals, project objectives, business needs, dependencies, risks and strategic approach.
- Document all agreements.
- Create a preliminary breakdown of roles and responsibilities. You might want to use RACI model (Appendix C) for this effort.

Appendix 1Ax. Project Charter Example

CONTENT STRATEGY ALLIANCE

Example Name	Example ID & Version	Phase	Creation Date
PROJECT CHARTER EXAMPLE	prjc-apdx-xmpl-01	APPENDIX 1A	MARCH, 2015

A	**General Information**	
	Project Title:	**Sea Cruises Website Re-launch** — **Prepared by:** Ima Expert
	Project Working Title:	**Sea Cruises 2015**
	Project Manager:	**Sandy Beach**
	Project Sponsor:	**Chanda Lear**
B	**Project Overview**	
1	**Identification:** Identify the formal name and any associated acronyms or abbreviations for the project, the project team, and the product.	Sea Cruises
2	**Project Background:** Provide background information about how and why the project was initiated.	The traditional customers are abandoning Sea Cruises for specialty cruises. Project will reinforce the company offerings
3	**Purpose / Business Need:** A brief description of the project should be provided. This should describe in business terms the reason for the project and the overall timing and expectations.	Need to get repeat customers.
4	**Project Scope:** Identify the boundaries of the project. Define what features and functionality will be delivered.	Build a responsive website with videos showing cruise activities and ports
5	**Project Objectives:** Identify the overall objectives for the project.	Increase brand awareness
6	**Sponsorship & Ownership:** Identify who is sponsoring the project and who has final ownership. Include a list of sponsoring stakeholders. Indicate if someone is (from RACI Matrix): Responsible, Accountable, Consulted, or Informed.	
7	**References:** Identify any other documents pertinent to the project.	
8	**Terminology:** Define any unique or significant terms and/or acronyms that will be commonly used within the project.	
C	**Project Approach Section**	
1	**Project Deliverables and Quality Objectives:** Provide a list of major and key deliverables that will be generated during and on completion of the project. Identify key milestones. For each deliverable, provide a description of its quality objectives in terms of output quality and approval requirements.	Site map, content matrix with gap analysis, 10 page templates, wireframes for main areas (TBD), three creative directions with up to 5 key pages, CMS recommendations, 10 responsive page templates, keyword research, metadata for 10 pages, SEO best practices and guidelines.
2	**Organization and Responsibilities:** Identify the required Project Team and, taking the project skill requirements into account, assign roles and responsibilities to named individuals. At a minimum, this section should address the Business Leader, Project Manager, and the Executive Committee.	Consulting firm will lead the project with oversight from the project sponsor
3	**Reporting, Oversight, & Review:** Describe reporting relationships. Identify required approvals.	Consulting firm will submit weekly reports to the project sponsor on progress.
4	**Dependencies:** Any dependencies outside of the Project Manager's direct control, or outside of the scope of the project (that may influence the project success) should be identified.	Client will provide content by the end of the design phase
5	**Plans for Support Activities:** Plans for project support activities are described here.	TBD
6	**Project Facilities and Resources:** The project's requirements for facilities and resources are described here.	Consulting firm will provide resources and work location as per the contract
7	**Risk Management:** Any risks associated with the project and the actions that can be taken during the project to minimize the risks need to be identified.	None at this time
8	**Process Options and Deviations:** A defined Project Management Methodology and Systems Development Life Cycle Methodology should be identified by reference in this section.	Refer to the Project Management Methodology and Systems Development Life Cycle Methodology document
9	**Process Stages:** A description of the project life cycle should be detailed here. For each life cycle phase, applicable procedures, methods, and standards should be referenced or identified.	Phase 1: Home Page, About Us, Investor Relations, Newsroom, Careers, Contact Us. Phase 2: Our Portfolio, Our Team, blog pages; strategy guidance; content matrix; sitemap, wireframes; responsive design; technical development; front- and back-end development. Phase 3: Search engine optimization; site analytics
10	**Project Control:** Project control explains the methods and processes that will be implemented to assist the Project Manager in identifying project progress and communicating that progress to the project team, project sponsor, and project stakeholders. This section should also identify the methods and policies to be used for project scope control, issue management, and change and configuration management.	
11	**Provide a high-level overview of the project approach, project team structure and project plan.**	
D	**Approval Section**	
1	Charter Approval	Rhoda Carr, VP/Marketing
2	Charter Approval	
3	Charter Approval	
4	Charter Approval	
5	Charter Approval	
6	Charter Approval	
7	Charter Approval	
8	Charter Approval	
E	**Appendices**	
1	N/A	N/A
2	N/A	

Appendix 1B. Stakeholder Register

A stakeholder register lists stakeholders and their information (title, department, etc.) as well as defines how you will interact with them. A stakeholder is someone within an organization who can affect decisions.

Create a Stakeholder Register:

- Identify stakeholders' names, title, department, role in the project and stakeholder type.
- Decide how much information they need to be given, for example, included on all communications or only ones that are urgent.
- Decide how you will communicate with each stakeholder: email, website updates, texts, etc.
- What expectations does each stakeholder have about the project?
- What are the main interests of the stakeholder?
- What type of influence does each stakeholder exert on the outcome of the project?

Appendix 1Bx. Stakeholder Register Example

Example Name	Example ID & Version	Phase	Creation Date
STAKEHOLDER REGISTER EXAMPLE	stkr-apdx-xmpl-01	APPENDIX B	Mar-15

Project Name: Boca Raton Resorts Website **Date: 5-1-15**

Project Phase:

Stakeholder	Title	Department	Role in Project	Stakeholder Type	Communication Methods	Expectations	Interests	Influence on Project Outcome
Sandy Beach	Marketing Director	E-Commerce	Subject Matter Expert	Definitive	Email	Be kept in the loop	The new marketing campaign	Will be very involved

Appendix 1C. RACI Model

The RACI Model is a tool used to identify roles and responsibilities on a project. It helps define who needs to be informed of or consulted on particular actions taken. The acronym RACI stands for:

Responsible: The person who "owns" a particular task. As a rule this is one person, e.g., the head of content, project manager or technical expert. They may do it themselves or delegate but it is their responsibility to see that the work gets done and decisions made.

Accountable: The person who is accountable for the correct and thorough completion of the task. They will sign off on the completion of the task. This must be one person and is often the project executive or project sponsor.

Consulted: The people who provide information for the project and with whom there is two-way communication. This is usually several people, often subject matter experts, legal/compliance officers, information technologists, etc.

Informed: The people who are kept informed about progress and with whom there is one-way communication. These are people that are affected by the outcome of the tasks so they need to be kept up-to-date.

Create a RACI Model:

- List names and their roles.
- List the task.
- Choose the RACI definition that fits each task

Appendix 1Cx. RACI Model Example

Example Name	Example ID & Version	Phase	Creation Date
RACI MODEL EXAMPLE	raci-apdx-xmpl-01	DESIGN	MARCH, 2015

DEFINITIONS

			The person who "owns" a particular task. As a rule this is one person, e.g., the head of content, project manager or technical expert. This person may do it him/herself or delegate but it is his or her responsibility to see that the work gets done and decisions made.	The person who is accountable for the correct and thorough completion of the task. He or she will sign off on the completion of the task. This must be one person and is often the project executive or project sponsor.	The people who provide information for the project and with whom there is two-way communication. This is usually several people, often subject matter experts, legal/compliance officers, information technologists, etc.	The people who are kept informed about progress and with whom there is one-way communication. These are people that are affected by the outcome of the tasks so need to be kept up-to-date.
NAME	ROLE	TASK	RESPONSIBLE	ACCOUNTABLE	CONSULTED	INFORMED
Carrie Bradshaw	Project Manager	Create a new web page	X			
Samantha Jones	Copywriter	Create a new web page			X	
Jerry Seinfeld	Developer	Create a new web page		X		
Elaine Benis	Business Analyst	Create a new web page				X

Appendix 1D. Staffing Plan

You may find that you are the only content strategist or content person on a project. But on larger projects, there may be many content team members, covering specialized areas, so a staffing plan may be needed.

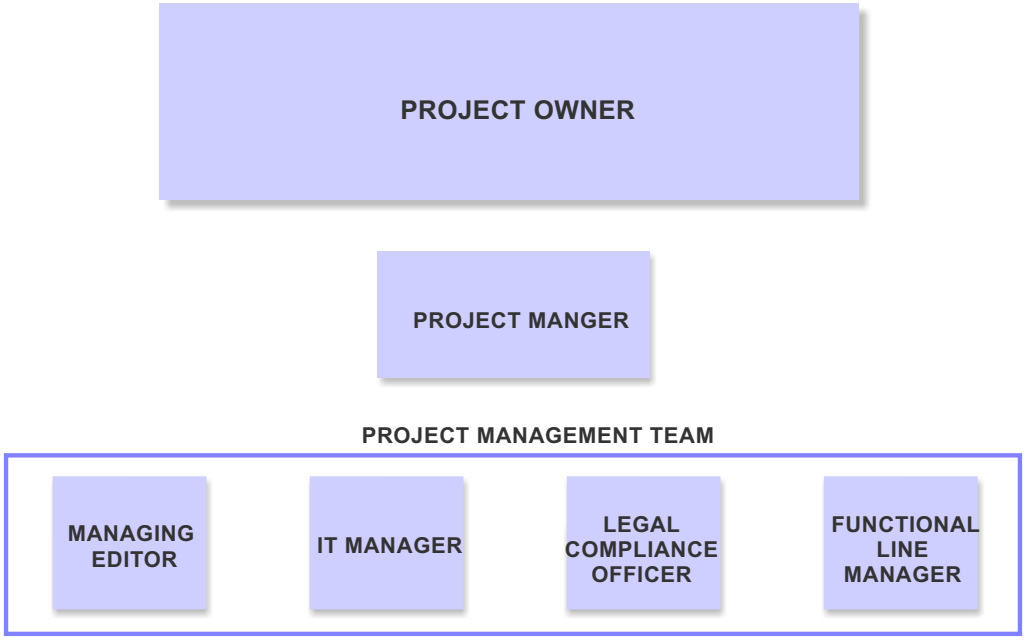
Create a Staffing Plan:

- Work with the project team to determine what roles are necessary to support ongoing content operations.
- Ensure that the governance team understands and weighs in on the process.
- Consider any budgetary constraints.
- Create an organization chart, if one does not exist.
- Define roles and responsibilities. Refer to the project charter, content brief and the RACI model (Appendix C) for help with this.

Appendix 1Dx. Staffing Plan Example

The chart below is an example of roles that might be included on a project team. Various factors will determine the roles, including size of the organization, available expertise, project purpose, and budget and time constraints. Some roles may only be included during certain stages of the project. You can add and delete boxes to fit your project, as well as add staff names.

EXAMPLE OF A POSSIBLE CONTENT STRATEGY PROJECT TEAM STAFFING PLAN



SEE TABLE 1. CONTENT SUB-TEAM EXAMPLE ON THE NEXT PAGE

Appendix 1Dx. Staffing Plan Example

TABLE 1. CONTENT SUB-TEAM EXAMPLE

ROLES	RESPONSIBILITIES
Analytics expert	Works with web analytics, content analytics, user feedback, and user testing to rate content performance.
Content creators	Create content including text, images and multimedia such as videos, podcasts, etc.
Content engineer	Organizing and shaping the structure and application of content within technical environments, for example, content management systems.
Content management experts	Oversee the content management processes from a technical and operational standpoint.
Content managers per business unit	Cover the various lines of business to represent their needs and how content functions within each.
Content providers	Syndication, third-party vendors and others who offer content.
Content strategist lead	Plans for the creation, distribution and maintenance of content.
International/regional/ localization/internationalization expert	Ensure international, regional, localization and internationalization content requirements and needs are considered
Legal reviewers	Ensures that all content complies with all legal and regulatory guidelines and rules.
Marketing & brand experts	Safeguard the interests of the brand in decisions and represent the needs and requirements of the marketing team(s).
Omnichannel/multichannel experts	Represent channel needs and requirements for mobile smartphone, tablet, in-store, desktop, websites, email, etc.
Personalization expert	Provide guidance on personalization strategy and efforts.
Product line or sales representatives	Represent the needs and requirements from various lines of products and for those of the sales teams.
Search engine optimization (SEO) experts	Implements SEO tactics and enforces guidelines for digital solutions, or any type of experience where search is a component.
Taxonomists/ metadata specialists	Review and validate any decisions impacting taxonomy, especially enterprise taxonomies. Create and maintain metadata ("data within data") frameworks, including schemas, vocabulary, conceptual models, content standards, and encoding.
Translation expert	Ensure content is translated into the appropriate languages

Appendix 1E. Component Content Management System (CCMS) Life Cycles

A content life cycle would typically be leveraged by a component content management system (or CCMS). A CCMS can leverage content that is authored using a standard markup language (such as XML), and provides the ability to manage different content components (for example, a single image, table, or section, also known as the “information layer”).

A CCMS leverages reuse as much as possible, so users can avoid the need to copy/paste or re-create the same content. Additionally, a CCMS can leverage translation services, so natively authored content can be linked to its corresponding translated components. Since the components are managed at a logically granular level, they can be easily versioned, reused, linked, assembled, and reassembled into different content “assemblies” (hierarchical structures that are used to organize different content components) for various outputs (such as PDFs, HTML, or Online Help Guides, also known as the “presentation layer”).

Appendix 1F. Customer Life Cycle Stages: AIDA +P

Following are the typical life cycle stages (know as AIDA+P) customers go through in the purchasing process:

- Awareness occurs during the discovery stage and is when the buyer identifies a problem or opportunity.
- Interest, also known as the research stage, is when the buyer identifies potential solutions.
- Desire, also known as the prospecting stage, occurs when the buyer chooses vendor finalists to provide solutions to the problem.
- Action occurs during the opportunity stage, when the customer selects and secures the vendor to provide the solution.
- Post-Purchase or the Consumer Advocate Stage is the state after purchase when hopefully the buyer advocates for the product. An example of advocacy is when a buyer shares positive information about their purchase on social media.

Appendix 1G. Error Messages

An error message is information given to the user on screen (computer or other device) when an unexpected event occurs, such as "file not found" or "access denied." In an ideal world, error messages should be a shared responsibility of product engineering, quality engineering, content strategy and user experience design teams. A good error message is direct, short and communicates just the right amount of information.

Create Error Messages:

- Use short sentences, 15 words at the maximum and no more than three sentences.
- Determine if the message is an error, warning, question or a piece of information for the user. The error message could begin with labels such as: "Error" or "Warning."
- If the message is an error or a warning, the message should clearly capture what went wrong.
- What is the solution/workaround? If no workaround is available, request users to contact customer support.
- Every error message should have a unique alphanumeric error code that customers can search for on the Web and quote when they call customer service for support. (Content strategists often use metatags for troubleshooting documentation as an SEO measure.)

Reference:

Content Strategy Alliance blog – *Error Messages: Best Practices for Supportable Product Development*

Appendix 1Gx. Error Messages Example

CONTENT STRATEGY ALLIANCE

Example Name	Example ID & Version	Phase	Creation Date
ERROR MESSAGE EXAMPLE .	erms-apdx-xmpl-01	APPENDIX G	MARCH, 2015

LEGEND

Error—Highest severity. Causes task disruption. Generally requires some user action.
Warning—Lower severity. Unusual application behavior requiring no user action.
Information—Lowest severity. Useful information requiring no user action.

Depending upon the needs of the organization, other severity labels (log, fatal,) may be in use

More information
http://contentstrategyalliance.com/2014/12/29/error-messages-best-practices-for-supportable-product-development/

Unique Error Code	Error Message	Severity (Error/Warning/Information)	Definition	Reason	Solution/Workaround
IMG-PS-0087	Error: Could not write to the disk because it is full. Delete some files and try again.	Error	Could not write to the disk	Disk is full.	Delete some files and try again.

APPENDIX 2
TEMPLATES & EXAMPLES LIST

Template & Example Downloads

Download the complete folder of templates and examples DOWNLOAD

Individual Downloads

Best Practice	Template Links	Example links
Planning Phase		
Content Project Brief	cpb-pln-tmpl-01	cpb-pln-xmpl-01
Governance Model	gmp-pln-tmpl-01	gmp-pln-xmpl-01
Stakeholder Interviews/Organizational Needs Surveys	sons-pln-tmpl-01	sons-pln-xmpl-01
Content Strategy Roadmap	csr-pln-tmpl-01	csr-pln-xmpl-01
Assessing Phase		
User/Customer Experience Assessment	cuxa-ase-tmpl-01	cuxa-ase-xmpl-01
Content Inventory	cinv-ase-tmpl-01	cinv-ase-xmpl-01
Content Audit/Assessment (same as the content inventory template and example)	cinv-ase-tmpl-01	cinv-ase-xmpl-01
Competitive Analysis	cmp-ase-tmpl-01	cmp-ase-xmpl-01
Content Strategy Document (template 1)	csd-ase-tmpl1-01	csd-ase-xmpl-01
Content Strategy Document (template 2)	csd-ase-tmpl2-01	
Analyzing Phase		
Content Model (High-Level)	cmod-anl-tmpl-01	cmod-anl-xmpl-01
Personas	per-anl-tmpl-01	per-anl-xmpl-01
User/Customer Journeys	usj-anl-tmpl-01	usj-anl-xmpl-01
User/Customer Journeys for Omnichannel		usjo-anl-xmpl-01
Content Maps	cmap-anl-tmpl-01	cmap-anl-xmpl-01
Content Maps (Tree Map) Example2		cmap-anl-tmpl2-01
Taxonomy	txmy-anl-tmpl-01	
Taxonomy (High-Level)	txhl-anl-tmpl2-01	txhl-anl-xmpl-01
Content Migration Plan	cmig-anl-tmpl-01	cmig-anl-xmpl-01

Template & Example Downloads

Download the complete folder of templates and examples DOWNLOAD

Individual Downloads

Best Practice	Template Links	Example links
Design Phase		
Messaging Statements	mess-dsn-tmpl-01	mess-dsn-xmpl-01
Voice & Tone Guide	vtg-dsn-tmpl-01	vtg-dsn-xmpl-01
Editorial Style Guide	esg-dsn-tmpl-01	esg-dsn-xmpl-01
Experience-Level, Page-Level & Page Type Level/Strategic Intent Document	plcs-dsn-tmpl-01	plcs-dsn-xmpl-01
Content Types	ctyp-dsn-tmpl-01	ctyp-dsn-xmpl-01
Content Matrix (General)	cmax-dsn-tmpl-01	cmax-dsn-xmpl-01
Content Development Matrix/Content Creation Schedule	cdmx-dsn-tmpl-01	cdmx-dsn-xmpl-01
Content Logic Rules (same as the content model template & example)	cmod-dsn-tmpl-01	cmod-dsn-xmpl-01
Content Model (Final)	cmod-dsn-tmpl-01	cmod-dsn-xmpl-01
SEO Recommendations	seor-dsn-tmpl-01	seor-dsn-xmpl-01
Content Life Cycle & Workflow (example 1)	clcw-dsn-tmpl-01	clcw-dsn-xmpl1-01
Content Life Cycle & Workflow (example 2)		clcw-dsn-xmpl2-01
Content/Editorial Calendar	ccal-dsn-tmpl-01	ccal-dsn-xmpl-01
Content/Editorial Calendar (Social Media)	ccsm-dsn-tmpl-01	ccsm-dsn-xmpl-01
Localization and Translation Plans	ltp-dsn-tmpl-01	ltp-dsn-xmpl-01
Metadata Strategy	mds-dsn-tmpl-01	mds-dsn-xmpl-01
Performance Metrics	pmet-dsn-tmpl-01	pmet-dsn-xmpl-01
Content Creation Guide	ccg-dsn-tmpl-01	ccg-dsn-xmpl-01
Project Charter 1A	prjc-apdx-tmpl-01	prjc-apdx-xmpl-01
Stakeholder Register 1B	stkr-apdx-tmpl-01	stkr-apdx-xmpl-01
RACI Model 1C	raci-apdx-tmpl-01	raci-apdx-xmpl-01
Staffing Plan 1D	stfp-apdx-tmpl-01	stfp-apdx-tmpl-01
Error Messages 1G	erms-apdx-tmpl-01	erms-apdx-xmpl-01